Poly Trio Solution

Contents

Before You Begin

Topics:

- [Audience, Purpose, and Required Skills](#)
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This *Poly Trio Solution User Guide* contains overview information for navigating and performing tasks with your Poly Trio system.

This guide covers the following 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 the Polycom Trio 8500 system, and Polycom Trio 8800 system, and Polycom Trio Visual+ accessory or Polycom RealPresence Trio 8500 system, Polycom RealPresence Trio 8500 system, and Polycom RealPresence Trio Visual+ accessory. The Poly Trio VisualPro system is also known as the Polycom Trio VisualPro system.

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 Poly and Partner Resources

See the following sites for information related to this product.

- The [Poly Online Support Center](#) is the entry point to online product, service, and solution support information including Video Tutorials, Documents & Software, Knowledge Base, Community Discussions, Poly University, and additional services.

- The [Polycom Document Library](#) provides support documentation for active products, services, and solutions. The documentation displays in responsive HTML5 format so that you can easily access and view installation, configuration, or administration content from any online device.

- The [Poly Community](#) provides access to the latest developer and support information. Create an account to access Poly support personnel and participate in developer and support forums. You can find the latest information on hardware, software, and partner solutions topics, share ideas, and solve problems with your colleagues.

- The Poly Partners are industry leaders who natively integrate the Poly standards-based RealPresence Platform with their customers' current UC infrastructures, making it easy for you to communicate face-to-face with the applications and devices you use every day.

- The Poly Services help your business succeed and get the most out of your investment through the benefits of collaboration.

Getting Started

Topics:

Before you use your phone, familiarize yourself with its features and user interface.

Note: As you read this guide, remember 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.

Product Overview of Poly Trio Systems

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

Trio 8300 System Features and Capabilities

Trio 8300 systems support 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 phone settings
- Pairing with Bluetooth–enabled devices
- Checking voicemail messages
- Connecting to computers over USB
- Sharing content during video calls
- Placing, answering, and managing video calls
- Connecting to wireless networks
- Pairing with Poly Trio Visual+ content and video accessories
- Placing video calls with Polycom EagleEye Mini USB cameras or Poly EagleEye Cube USB cameras

- Adjusting the camera and setting camera presets for connected USB cameras

Trio 8500 System Features and Capabilities

Trio 8500 systems support 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 phone settings
- Pairing with Bluetooth–enabled devices
- Checking voicemail messages
- Connecting to computers over USB
- Sharing content during video calls
- Placing, answering, and managing video calls
- Pairing with Poly Trio Visual+ content and video accessories
- Pairing with Poly Trio VisualPro content and video accessories
- Pairing with Polycom RealPresence Group Series systems
- Placing video calls with Polycom EagleEye Mini USB cameras, Poly EagleEye Cube USB cameras, Poly Studio cameras, or Logitech C930e webcams
- Adjusting the camera and setting camera presets for connected USB cameras

Trio 8800 System Features and Capabilities

Trio 8800 systems support 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 phone settings
- Checking voicemail messages
- Connecting to computers 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 wireless networks
- Pairing with Poly Trio Visual+ content and video accessories
- Pairing with Poly Trio VisualPro content and video accessories
- Pairing with Polycom RealPresence Group Series systems

- Placing video calls with Polycom EagleEye Mini USB cameras, Poly EagleEye Cube USB cameras, Poly Studio cameras, or Logitech C930e webcams
- Placing video calls with Polycom EagleEye IV USB cameras or Polycom EagleEye Director II cameras
- Adjusting the camera and setting camera presets for connected USB cameras

Poly Trio System Hardware Overview
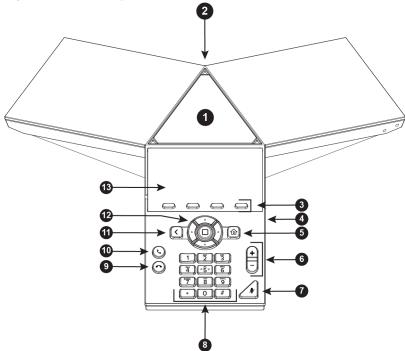
The following figures and tables provide information about hardware features available on your system.

Related Links

Connecting a Device Using a USB Cable on page 76
Users with Limited Mobility on page 25

Trio 8300 System

The following figure displays the hardware features on Trio 8300 systems. The table lists each featured numbered in the figure.

Figure 1: Trio 8300 system hardware features

Trio 8300 System Hardware Feature Descriptions
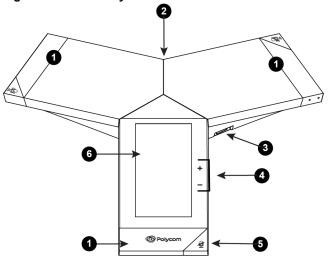
Reference Number	Feature	Feature Description
1	Speaker and microphones	Sends your audio to call participants and provides audio output for the ringer and speakerphone.

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	Enables 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	Adjusts 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	Dialpad	Enables you to enter numbers, letters, and special characters. You can also use the dialpad 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.

Trio 8500 System

The following figure displays the hardware features on Trio 8500 systems. The table lists each featured numbered in the figure.

Figure 2: Trio 8500 system hardware features
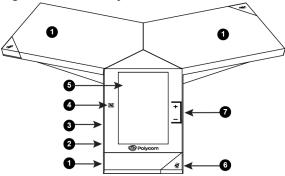
Trio 8500 System Hardware Feature Descriptions

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	Adjusts 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.

Trio 8800 System

The following figure displays the hardware features on Trio 8800 systems. The table lists each featured numbered in the figure.

Figure 3: Trio 8800 system hardware features

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	Adjusts the volume of the audio from the speakerphone and ringer.

Navigating Poly Trio Phones

Your 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
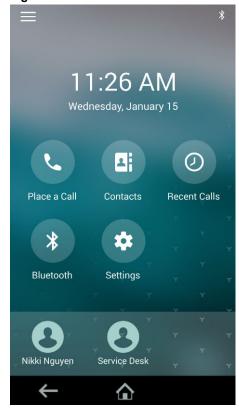
You can access the following screens on your phone:

- **Home**: Displays your messages, settings, and information.
- **Calls**: Displays all active and held calls on your line.
- **Place a Call**: Enables quick access to the dialpad, **Recent Calls**, **Contacts**, and **Calendar**.

Access the Home Screen

The **Home** screen displays icons to access features, settings, additional registered lines, and favorite contacts.

Figure 4: Home Screen

Procedure

» Do one of the following:

- Select **Home** ⌂.
- Select **Menu** ☰ > **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. It indicates which page you're currently viewing as a series of dots. The phone uses dots to indicate the number of available screens (pages) and which screen you're currently on.

Procedure

» On the **Home** screen, press and hold the page indicator to switch between large or small menu option icons.

Accessing the Place a Call Screen

The **Place a Call** screen displays when you select **Place a Call** on the **Home** screen or when the system is idle (if set by your administrator).

Place a Call screen

From the **Place a Call** screen, you can access the dialpad, **Contacts**, **Recent Calls**, and the **Calendar**.

Accessing the Calls Screen

The **Calls** screen displays automatically when you place a call and when you have an active call in progress.

For active calls, the phone displays the contact's name, number and the call duration.

Figure 5: Active call on the Calls screen

You can also view active and held calls on the phone. If the phone has multiple lines, active and held calls display under the associated line.

Figure 6: Multiple calls on the Calls screen
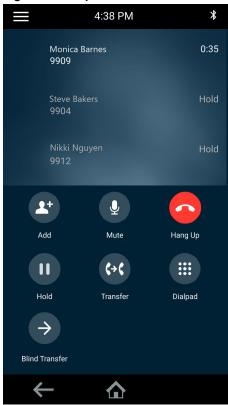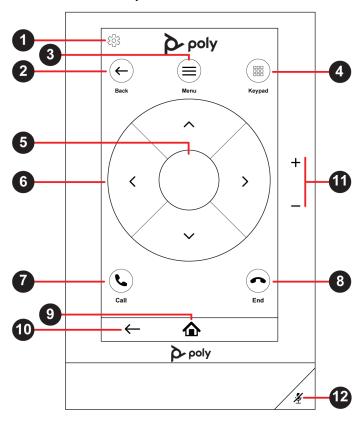
Figure 7: Multiple Calls on the Trio 8300 Calls screen

Poly Controller Screen

The Poly Controller enables you to operate Poly G7500, Poly Studio X50, or Poly Studio X30 systems using your Poly Trio touchscreen. The Poly Controller is available for Poly Video mode on Trio 8500, Trio 8800, and Trio C60 systems.

Poly Controller Screen Feature Descriptions

Reference Number	Button Name	Description
1	Settings	Opens the Trio settings menu.
2	Back	Returns to the connected system's display menu.
3	Menu	Opens the connected system's menu.
4	Keypad	Opens the system display and the Trio dialpad.
5	Select	Selects a field of displayed data.
6	Navigation Keys	Navigates through information and menus on the connected system's display.
7	Call	Calls the entered number.

Reference Number	Button Name	Description
8	End	Ends the active call.
9	Home	Returns to the Trio controller's **Home** screen.
10	Previous	Returns to the previous Trio settings menu.
11	Volume Keys	Controls the device volume or controls the camera zoom in and out.
12	Mute	Mutes the microphones during calls.
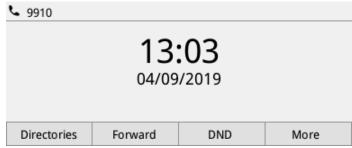
Accessing Screens on the Trio 8300 System

Navigate your Trio 8300 systems using the keypad and LCD screen.

Home Screen

The **Home** screen displays when the phone is idle. It enables quick access to softkey functions such as DND and call forwarding.

Figure 8: Home Screen on Trio 8300 system
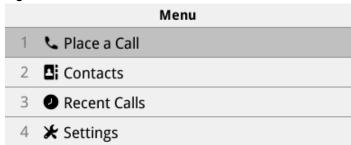
Press the **Home** ⌂ key from any screen to return to the **Home** screen.

Access the Main Menu

On Trio 8300 systems, access phone features and settings from the **Main Menu** screen.

Figure 9: Main Menu on Trio 8300

Procedure

» From the **Home** screen, press the **Home** ⌂ key.

Accessing the Place a Call Screen

On Trio 8300 systems, the **Place a Call** displays when you select **Place a Call** from the main menu or when you dial a number.

Figure 10: Place a Call screen on Trio 8300

Icons and Status Indicators

The following table displays the icons and status indicators that display on your phone.

Icons and Status Indicators

Icon	Description
	Registered line
	Unregistered line
	Active call
	USB device attached
	Missed call
	Placed call
	Received call
	Call Forwarding enabled
	Do Not Disturb enabled
	Bluetooth
	Wireless status (Trio 8300 and Trio 8800 systems only)
	Paired device

Related Links

Entering Information Using the Onscreen Keyboard

The onscreen keyboard enables you to enter information into text fields using the touchscreen.

The onscreen keyboard displays when a text field displays. When a text field requires only numbers, it displays a numerical keypad instead.

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** ?123 : Displays numbers and punctuation marks
- **Special characters** =\< : Displays special characters

Change the Keyboard Layout

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. Clear the **Use System Language** check box.
3. Select one or more available languages and press the back arrow.

   The phone enables each language you select, 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.

Entering Information Using the Dialpad

On Trio 8300 systems, enter information and edit text fields using the dialpad.

Before you enter information into fields, choose how to enter the information using the following softkeys:

- **Mode**: Enables you to enter numbers or text in title case, lowercase, or uppercase characters.
- **Encoding**: Enables you to enter characters from foreign languages.

Change the Text Mode

To enter numbers or all uppercase, all lowercase, or title case letters, change to the appropriate the text entry mode.

You can adjust the text entry mode when you select **ASCII** encoding.

Procedure

1. Press the **Mode** soft key.
2. Choose one of the following:

   • **Abc**: Capitalizes the first letter of each word and uses lowercase for the remaining letters.

   • **ABC**: Uses capital letters for all the letters you enter.

   • **abc**: Uses lowercase letters for all the letters you enter.

   • **123**: Enter numbers only.

   Your selected text entry mode becomes active.

Change the Text Encoding

To enter characters from different alphabets, change the text entry encoding.

Procedure

1. Select the **Encoding** soft key.

   You may need to scroll to the next page of soft keys to find **Encoding**.
2. Choose one of the following:

   • **ASCII**: Enter letters from the Latin alphabet.

   • **Latin**: Enter accented letters.

   • **Katakana**: Enter Japanese katakana.

   • **Unicode**: Store characters as double bytes.

   • **Cyrillic**: Enter letters from the Russian alphabet.

   Your selected text entry encoding method becomes active.

Enter Special Characters on the Dialpad

Select special characters used for punctuation or a space from certain keys on the phone's numerical dialpad.

You can adjust the text entry mode when you select **ASCII** encoding.

Note: When you're in numerical (**123**) mode, you can't access special characters or spaces.

Procedure

1. Repeatedly press the indicated key until the desired special character displays. For example, pressing the **1** key twice enters "|".

Key	Special Characters
1	! | ' ^ \ @ : 1
*	* - & % + ; ( )
0	/ , _ $ ~ = ? 0
#	# > < { } [ ] " '

To enter a space, press **0** once. Pressing **0** twice displays "/".

2. Wait one second for the system to select your character.

The onscreen cursor moves to the next character entry.

Accessibility Features

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

Users Who Are Deaf or Hard of Hearing

Your phone includes accessibility features for users who are deaf or hard of hearing to use the phone.

The following table lists the accessibility features for users who are deaf or hard of hearing.

Accessibility Features for Users Who Are Deaf or Hard of Hearing

Accessibility Feature	Description
Visual message indicators	Icons on the screen indicate when the system has new messages.
Adjustable ringer and call volume	You can change the volume of the ringer to suit your needs. Also, you can separately control the call audio volume.
Selectable Ringtone	You can choose from a variety of ringtones for incoming calls.
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.

Related Links

Users with Limited Mobility

Your phone includes features that enable users with limited mobility to use various features.

The following table lists the accessibility features for users with limited mobility.

Accessibility Features for Users with Limited Mobility

Accessibility Feature	Description
Auto-answering	You can enable the phone to auto-answer calls.
Touchscreen	The large touchscreen enables you to select, swipe, and press the screen to perform functions and activate features.

Related Links

Users Who Are Blind, Have Low Vision, or Have Limited Vision

Your phone includes accessibility features for users who are blind, have low vision, or have limited vision to use the phone.

The following table lists the accessibility features for users who are blind, have low vision, or have limited vision.

Accessibility Features for Users Who Are Blind, Have Low Vision, or Have Limited Vision

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 phone to auto-answer calls.

Related Links

Logging In to and Locking the System

Topics:

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

Logging In to Your Poly Trio Phone

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 your user login options, you may need to log in to a Poly phone before you can use one.

By default, Poly devices don't require you to log in before you can use them. If you don't 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 on a public phone commit to your profile and display the next time you log in to any phone.

Procedure

1. Select **Login**.
2. If you see the **User Login** screen, proceed to the next step.

   If you don't see the **User Login** screen, go to **Settings** > **Features** > **User Login** > **Log In**.
3. Enter your user ID and password, and select **Log In**.

   Your personal profile displays when you enter the correct login credentials. If you enter incorrect credentials, a message indicating that your login attempt has failed displays and the **User Login** screen displays 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 go to **Settings** > **Features** > **User Login** > **Log Out**.

The **Log Out** screen displays 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. Go 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 changes. The next time you log in to a phone, you must enter your new password.

Locking Your Poly Trio Phone

If your system administrator has set up the system to lock when it isn't in use, you must unlock it before you can use the system.

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

With the system locked, you can do the following:

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

Related Links

Lock the Phone

You can lock a phone so that only authorized personnel can use it. Some features are available for users with a valid user password.

Procedure

1. Go to **Settings** > **Basic** > **Lock Phone**.
2. On the **Lock Phone** screen, select either of the following options:
   - **Allowing ringing when locked** - Incoming calls ring on the system, and you can answer calls by entering a user password.
   - **DND when locked** - Do Not Disturb applies to all lines, and the system doesn't ring for incoming calls.
3. Select **Lock**.

Unlock the Phone

You can unlock the phone with your user password.

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 your phone.

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. Go 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:

By default, your phone 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

Poly phones enable you to place calls to local numbers, international numbers, and contacts.

You can initiate calls from your favorites list, recent calls list, and your phone directory. From a locked phone, you can place calls to numbers authorized by your system administrator.

Place an Audio Call

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

Procedure

1. Select **Place a Call**.

   On the Trio 8300 system, you can also simply begin dialing a number on the dialpad.

2. Enter your contact's number, or select the onscreen keyboard ⌨ and enter an IP address.

3. Select **Dial** 📞.

Related Links

Place an International Call

You can place calls to international phone numbers on your phone.

Procedure

1. On the dialpad, quickly press the star key (*) twice.

   A plus sign (+) displays.
2. Enter the country code and phone number then select **Dial** 📞.

Place a Call from Recent Calls

You can place calls from the **Recent Calls** list, which contains calls that you 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 begins automatically after you select a contact.

Related Links
Recent Calls on page 66

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 the favorite's avatar.

Procedure

» On the **Home** screen, select a favorite.

Place a Call over Bluetooth

You can pair and connect your phone with a Bluetooth–enabled mobile phone or tablet. Calls placed call on your device and use the phone as a speakerphone for the call. These steps apply to most mobile phones and tablets. For more information refer to your mobile phone or tablet's product documentation.

Procedure

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

Related Links
Connecting Devices Using Bluetooth on page 74

Calling Contacts from Directories

On Poly Trio systems, you can search for and call contacts in your contact directory, the corporate directory, and the BroadSoft directory, if enabled.

Call a Contact from a Directory

Place a call directly from your directory or select contacts in your directory to call on the **Place a Call** screen.

Procedure

1. Do one of the following:

   - Select **Contacts** and select a directory.

   - Select **Place a Call** and select **Contacts** 📇, and select a directory.

2. Select a contact.

3. On the **Details** screen, select **Call** 📞 next to the number you want to call.

Call a Contact from a Directory Search

Search for and call contacts on the **Search** screen in your directory.

Procedure

1. Select **Contacts** and select a directory.

2. In the **Search** field, enter your contact's name.

3. Select a contact.

4. On 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 sets up. You can't call any other numbers from a locked phone.

Procedure

» From the **Place an Authorized Call** screen, choose a number and select **Dial**.

Related Links

Placing Intercom Calls

Like a normal call, the intercom feature enables you to place a call to a contact.

An intercom call differs from a normal call in that the call recipient's phone answers automatically when not in an active call. Check with your system administrator to find out if this feature is available on your phone.

If the call recipient has an active call, the recipient can choose to answer the intercom call. Otherwise, the phone answers the intercom call automatically after their active call ends.

Related Links

Place an Intercom Call

You can place an intercom call from your phone 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 contact's phone answers the call automatically.
4. After your contact answers the call, speak your message and 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 goes on hold and the dialpad displays.
2. Enter a number or select a contact.
3. Select **Dial** 📞 .

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

Redial a Number

Your phone automatically keeps 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**.
   • Go to **Place a Call** > **Recent Calls** 🕐, and select the first number in the list.

Choosing a Protocol for Audio Calls

Your system administrator can set up your phone to handle calls that use the SIP protocol, the H.323 protocol, or both. You can choose the protocol you want to use before placing a call.

Contact your system administrator to find out if your phone supports placing calls using H.323 protocol.

When your phone supports the H.323 protocol, the following limitations apply:

- You can't forward or transfer H.323 calls.
- You can't set up forwarding for lines that use the H.323 protocol only.
- You can't set up shared lines on lines that use the H.323 protocol.
- You can't place a call by just an H.323 name. You must use URL dialing in the following format: `<H.323 name>@<server name>`.

For dual-protocol phones, the protocol displays next to all call IDs, including the call IDs for conference call participants and calls on hold.

Place an Audio Call Using H.323

Your phone uses the SIP protocol or URLs to place audio calls by default. If you have H.323 enabled, you can choose to use the H.323 protocol to place calls instead.

Note: When you enable H.323, your phone uses the H.323 protocol for all subsequent calls until you select a different protocol.

Procedure
1. Select **Place a Call**.
2. Select **Use H.323**.

   H.323 displays in the number field.
3. Enter your contact's H.323 URL name.

   For example, `Name@100.100.100.100`.

Set a Protocol for Placing Calls Automatically

You can set up your phone to automatically select a protocol to use for all calls, if enabled by your administrator.

When you place calls from call lists or directories, your phone automatically chooses the protocol to use based on the information provided for the contact.

However, when you add a new contact to your contact directory, you can specify which protocol the phone uses for calls placed that contact. Doing so ensures that your phone automatically uses the correct protocol when you dial the contact.

Procedure
1. Select **Place a Call**.
2. Select **Use Auto** to enable your phone to automatically select the protocol to use.

Answering Audio Calls

When you receive an incoming call on your phone, you can choose to answer the call in a number of different ways.

Answer an Incoming Call

When you receive an incoming call, the phone rings and the **Incoming Call** screen displays. On the **Incoming Call** screen, you can choose to answer or reject the incoming call.

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 answer calls using the **Mute** button.

Related Links
Decline an Incoming Call on page 35

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 displays.

Procedure

» Select **Answer**.

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

Answer Calls Automatically

You can set up your phone to automatically answer calls using Auto Answer.

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

The phone doesn't automatically answer a call until you place your current call on hold or end it.

Procedure

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Auto Answer**.
3. Select **Auto Answer SIP Calls** and select **Yes**.
4. Select **Microphone Muted** 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

Answer a Call on a Locked Phone

You can enable your phone to accept calls while it's locked. To answer calls on a locked phone, enter your password.

Procedure
1. On the **Incoming Call** screen, select **Answer**.
2. Enter your password and select **Enter**.
   The call connects.

Related Links

Answer an Intercom Call

When you receive an intercom call, your phone answers the call automatically as long as you don't have an active call already.

If the phone answers an intercom call with your microphone muted, you must unmute your microphone before responding to the call.

Related Links

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 can't decline calls for shared lines.

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

Related Links

End an Audio Call

You can end active calls at any time. To end a held call, resume the call and then end it.

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.

The **Mute** keys and microphones glow red when you place a call on hold. The **Mute** keys and microphones flash green when the other contact places you on hold.

Hold a Call

Place an active call on hold.

Procedure

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

Resume a Call

View and resume a held call.

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 contact.

Use one 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

Your phone is preconfigured to use consultative as the transfer type, but you can choose a default transfer type to use for all calls on your phone.

Procedure

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

    All calls use the selected transfer type you select.

Transfer a Call Using Blind Transfer

When you use Blind call transfers, calls transfer as soon as the recipient's line connects.

Procedure

1. During a call, select **Transfer** .
2. Dial a number or select a contact from **Recent Calls** or **Contacts**.

   The call transfers as soon as the recipient's line connects.

Transfer a Call Using Consultative Transfer

When you use consultative call transfers, you can speak with the recipient and then manually complete the transfer.

Procedure

1. During a call, select **Consult** ⊙.

   The phone places the caller on hold while you start the transfer.
2. Dial a number or select a contact from **Recent Calls** or **Contacts**.
3. When the recipient answers, speak with them and then select **Complete Transfer** to transfer the call.

   If the recipient either doesn't answer your call, or can't accept the call transfer and hangs up before you transfer the call, the original caller stays on hold. You can resume that call or try to transfer to another recipient.

Cancel a Transfer

If a contact doesn't answer the transfer or if you want to remain speaking with the contact on your line, you can cancel the transfer before it completes.

Procedure

» Select **Cancel**.

   The call doesn't transfer and becomes active.

Forwarding Incoming Calls to a Contact

You can forward 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.

Note: On shared lines, you must answer a call before forwarding it to a contact.

Procedure

1. On the **Incoming Call** screen, select **Menu** ☰ and select **Forward**.
2. On 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 automatically forward incoming calls to a specific contact.

Use 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 aren't available for shared lines.

Procedure

1. Select **Forward** or go 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. Optional: 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 ↪ displays on the line.

Disable Call Forwarding

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

Procedure

1. Go 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 reflecting your Do Not Disturb status scrolls under the time display. The **DND** icon doesn't display in the status bar.

Enable Do Not Disturb

Enable DND to prevent your phone from ringing and to send all incoming calls to voicemail. The phone logs all calls you receive while on DND in the **Recent Calls** list.

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

Procedure

» Do one of the following:

- Select **DND** on the **Home** screen, if enabled by your system administrator.
- Go to **Settings** > **Features** > **Do Not Disturb** and select **Enable**.

Disable Do Not Disturb

When you're ready to receive calls, disable DND.

Procedure

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

Managing Multiple Calls

Manage multiple active, incoming, or held calls.

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.

Figure 11: Multiple calls on the Calls screen
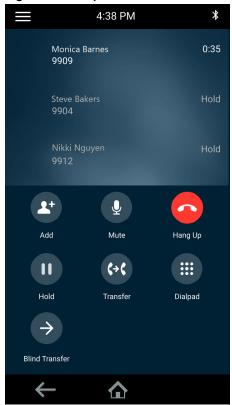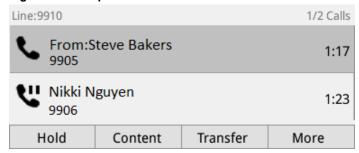
Figure 12: Multiple calls on the Trio 8300 Calls screen

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 **Hang Up** ☎ 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

Mute the microphone so other parties can't hear you.

Procedure

» Do one of the following:

- Select **Mute** 🎤 .
- Select the Mute key 🎤 on the phone.
- Select the Mute key 🎤 on the microphone.

Unmute the Microphones

Unmute your audio when you're ready to speak and let others on the call hear you.

Procedure

» Do one of the following:

- Select **Unmute** 🎤 .
- Select the Mute key 🎤 on the phone.
- Select the Mute key 🎤 on the microphone.

Conference Calls

Topics:

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.

Initiating Conference Calls

You can initiate conference calls with up to four contacts. As the host, 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 at a time. You can keep 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. This merges the contacts into a conference call.

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

   On the Trio 8300 systems, press the **Add** softkey.
3. Enter another contact's number or select a contact from **Contacts** or **Recent Calls**.

   The system adds the contact to the conference call after the contact answers.

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, choose a held call.

2. Select **Merge** 人 .

   The held call merges with the active call to initiate a conference call.

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 the Trio 8300 systems, press the **Add** softkey.

2. Do one of the following:

   - Enter a contact's number.

   - Select a contact from **Contacts** or **Recent Calls** and select **Dial**.

   When the contact answers, the phone adds the contact to the conference call.

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. 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

You can mute individual participants in a conference call, if enabled by your system administrator.

Procedure

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

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

Remove a Conference Participant

You can remove individual participants from a conference call, if enabled by system administrator.

Procedure

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

Video Calls on Poly Trio Systems

Topics:

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

You can pair Poly Trio Visual+ and Poly Trio VisualPro with Poly Trio systems, depending on the model:

- You can pair any Poly Trio system with a Poly Trio Visual+ accessory.
- You can pair a Trio 8500 or Trio 8800 system with a Poly Trio Visual+ accessory or Poly Trio VisualPro system. The Trio 8300 system doesn't support Poly Trio VisualPro systems.

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

- Polycom EagleEye Mini USB camera
- Polycom EagleEye IV USB camera
- Poly EagleEye Cube USB camera
- Poly Studio USB video bar
- Logitech C930e webcam

Poly Trio systems support the following cameras when paired with a Poly 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 don't have a camera connected to your paired device when you receive video during calls, you can see your contact's video but they can't see video from you.

Related Information

Tips for Video Calls

There are several things to consider when you place a video call to ensure the best experience.

- 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

Update video settings to change the way video calls display on your Poly Trio system.

If you update settings during a call, the phone does not apply them until the next 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. The new call rate applies to your next video call.

Note: Your system administrator can set a maximum call rate for video calls, and you can't select a call rate above this limit.

Procedure

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

Improve Video Clarity

You can change the target frame rate to improve video clarity.

The target frame rate determines how smoothly your video displays. You can set a rate between 5 and 30 frames per second. 30 frames per second is the smoothest frame rate. The default rate is 30.

Procedure

1. Go to **Settings** > **Basic** > **Video**.
2. Select **Camera Settings** > **Target Frame Rate**.

3. Choose **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.

Procedure

1. Do one of the following:

    • **Out of a call:** On the **Home** screen, select **Menu** ☰ > **Layout**.

    • **In a call:** On the **Calls** screen, select **Layout**.

2. Select a 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 multiple monitors.

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

    • Two monitors: You can configure content to display on one monitor or both monitors.

    • Three monitors: You can figure content to display on one monitor, a combination of two monitors, or all three monitors.

Procedure

1. Do one of the following:

    • **Out of a call:** On the **Home** screen, select **Menu** ☰ > **Layout**.

    • **In a call:** On the **Calls** screen, select **Layout**.

2. Select the monitors where you want to display video and content.

Adjust the Video Display

You can adjust video settings to control the appearance of video you receive from the far end.

Depending on how the far end video's aspect ratio differs from your display's aspect ratio, you can adjust how the video image displays on your screen.

Procedure

1. Go to **Settings** > **Basic** > **Video**.
2. Select **Video Screen Mode** and choose one of the following video screen settings:

    • **Normal**: The video image retains the aspect ratio sent from the far end. Black bars appear wherever the aspect ratio of the received video doesn't match your screen.

- **Full**: The system fits the video to the screen. Stretched portions of the video may appear distorted.
    - **Crop**: The system enlarges and crops the video to fit your screen without stretching the video.
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.

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

Pause Your Video

You can pause your video at any time during a call.

When you pause your video, your phone doesn't revert to an audio-only call. Your phone still sends video information to the far end, and you are still in a video call.

When you pause your video, the video muted 🚫 icon displays on the far end instead of your video stream.

Note: You can't start or pause far-end video. If your phone is set up to receive far end video, the far end video always displays.

Procedure
» On the **Call** screen, select **Stop My Video**.

Start Video During an Audio Call

You can send video at any point during an audio-only call if the phone has a camera connected.

Once you send video you can mute or pause the video, but you can't stop sending video and return to an audio-only call.

Procedure
» On 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:
    - Select **Camera** ⊕ .
    - Select **Menu** ☰ > **Camera**.
2. Do one of the following:
    - Select **Near** to adjust your camera.
    - Select **Far** to adjust a call participant's camera.
3. Adjust the camera position using one of the following options:
    - Use the onscreen arrows.
    - Drag your finger across the onscreen video stream.
    - 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 the camera settings on your Poly Trio system to improve video quality.

Procedure

1. Do one of the following:
    - Select **Camera** ⊕ .
    - Select **Menu** ☰ > **Camera**.
2. Select **Settings** ⚙ > **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 your administrator enables tracking, your camera can automatically frame the active speaker. If there are several participants in the video, the camera moves from participant to participant as they speak.

Tracking is available only with the following cameras:

- Polycom EagleEye Director II camera
- Polycom EagleEye Producer camera
- Poly EagleEye Cube USB camera
- Poly EagleEye Cube HDCI camera

Procedure

1. Do one of the following:
   - Select **Camera** ⊕ .
   - Select **Menu** ☰ > **Camera**.
2. Select **Settings** ⚙ > **Camera Preferences**.
3. Do one of the following:
   - Turn camera tracking on or off.
   - Select a **Tracking Mode**. You can choose from:
     ◦ Frame Speaker
     ◦ Frame Group
     ◦ Frame Group with Transition (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 someone shares content during a video call on Poly Trio systems, the content displays instead of participant video streams. You can configure the system to display the participant video stream instead of shared content.

Note: You can't switch content that someone shares using Apple AirPlay with the participant video stream. You must stop the content instead.

Procedure

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

Handling a Mixture of Audio and Video Calls

Your system displays different options based on the equipment you and your contacts use during a call.

Note the following when you participate in a mixed audio-video call:

- When you are in a call with contacts who have video-enabled phones or video-conferencing systems, 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 don't have a camera connected to your paired content and video accessory (for example, Poly Trio Visual+ or Poly Trio VisualPro), you can receive video but can't send video.
- Video always displays when a contact can send video and you enable the system 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.

Note: 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 predefined locations in a room, which remain 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 (if you have a connected Poly camera).

Note: You can only modify and store camera presets if the gear icon displays in Camera Options screen.

Procedure

1. Do one of the following:
   - Select **Camera** ⊕.
   - Select **Menu** ☰ > **Camera**.
   - On the **Home** screen, select **Camera**.
2. Adjust the camera to the 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, your system names presets in the order you set them, 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 its name.

Recording Audio Calls

Topics:

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

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

For a list of supported USB flash drives to record phone audio, see *Technical Bulletin 38084: Supported USB Devices* at [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

Use the following guidelines when recording audio calls on your phone.

- Inform contacts when you're recording a call.
- Make sure to mute your audio when you're placed on hold while recording the call.
- 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, 2019, 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

The phone allows you to record an active audio call. Make sure to inform your contacts on the call before you begin recording.

Some things to note about recording:

- You can't record 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.
- Your phone records some tones that your contact's phone makes.
- When you mute your microphone while recording, the phone doesn't record your audio and records only the other participants' audio.

Procedure

» During an active call, select **Menu** ☰ > **Start Recording** ⦿.

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

Pause a Recording

During a call, you might need to pause a recording while the call is active.

Procedure

» Select **Menu** > **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** ☰ > **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: Don't remove the USB flash drive while recording. Doing so may corrupt the file, preventing you from playing it back later. Removing the USB flash drive while recording can also damage the flash drive.

Procedure

» Do one of the following:

- Select **Menu** ≡ > **Stop Recording** ■.
- Select **Hang Up**.

When you stop recording, the **USB** icon displays in the status bar.

Browse Recorded Calls

You can browse recorded files stored on the USB flash drive connected to supported phones.

Procedure

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

A list of recordings displays.

Play a Recorded Call

Play back calls recorded on a USB flash drive connected to your phone.

Note: You can't open and play recordings when you are in an active call or if you're recording a call. If you try to, the phone cancels the action. Place the call on hold before playing 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 displays.
2. Select a recording.
3. Select **Open** > **Play**.

   The length of the recording and a progress bar displays 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 phone automatically pauses the recording playback. If you don't answer or reject the incoming call, the recording remains paused until you select **Resume**.

Procedure

1. To pause the recording, select **Pause**.
2. Select **Resume** to continue playing the recording.

Stop Playing a Recording

After you finish 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 displays.
2. Select a recording.
3. Select **Rename**, update the file name, and select **OK**.

Delete a Recording

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

Procedure

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

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

Sharing Content on Poly Trio Systems

Topics:

You can share content in and out of calls when your Poly Trio system is paired with a Poly Trio Visual+ accessory, a Poly Trio VisualPro system, or a 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 (Trio 8800 system only)
- Google Miracast (Trio 8800 system only)

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

Sharing Content with RealPresence Desktop or RealPresence Mobile

You can share content during a call with RealPresence Desktop on your laptop or RealPresence Mobile on your tablet.

Download RealPresence Desktop onto your laptop from [Polycom Support](#) or download RealPresence Mobile from your tablet's application store.

You can share the following content:

- RealPresence Desktop - Share your monitor or share an open application from your laptop
- RealPresence Mobile - Share the following content from your tablet:
  - Local documents
  - Photos
  - Websites
  - Content stored in Dropbox

◦ Annotations you make on the Whiteboard or Blackboard application within RealPresence Mobile

Sharing Content with the Polycom Content App

You can connect the Poly Trio system to the Polycom Content App to share content during meetings.

For more information on downloading and using the Polycom Content App, see the *Polycom Content App User Guide* at 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.

Note the following about People+Content IP:

- People+Content IP supports any computer desktop resolution, but video streamed to the system scales to either 720p or 1080p.
- People+Content IP provides video content only. It doesn't share audio.

Share Content using People+Content IP

You can share content with the People+Content IP application.

Before you share content, download and install the People+Content IP application from Polycom Support.

Procedure
1. Do one of the following:
   - **Windows computer:** Go to **My Computer** > **People+Content IP**.
   - **Mac computer:** Go to **Finder**. 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. Select **Connect**.
4. Open the content you want to share and select **Play** ▶ .

Stop Sharing Content with People+Content IP

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

Procedure
» In the People+Content IP application, select **Stop** ⏹ .

Share Content with People+Content IP over USB

You can connect your Windows or Mac computer to the system with a USB cable to share content using the People+Content IP application.

Before you share content, download and install the People+Content IP application from Polycom Support.

The system sends and receives video and data over the USB cable without using a network connection. This is useful for environments that don't allow guest IP access.

Procedure

1. Connect your Poly Trio system to your computer using a USB cable.

   A folder with the People+Content IP application opens automatically.

2. Optional: If the application folder doesn't open automatically, do one of the following:

   - **Windows computer:** Go to **My Computer** > **People+Content IP**.

   - **Mac computer:** Go to **Finder**. Search for and run the **People+Content IP** application.

3. Open the content you want to share and select **Play** ▶ .

Sharing Content from an Apple Device

If your system administrator enables screen mirroring on your Trio 8800 system, you can share content locally from your Apple AirPlay–certified device during in-room meetings.

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

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

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

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

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

Sharing Content from a Windows or Android Device

If your system administrator enables screen mirroring on your Trio 8800 system, you can share content locally from your Miracast–certified Android or Microsoft Windows device during in-room meetings.

You can't share content wirelessly from your device during point-to-point or conference calls. For more information on sharing content wirelessly, refer to your Windows or Android product documentation.

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

Poly Trio systems support 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

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 local interface:
    - **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 thePoly 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 App

With the Polycom Content app, 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 app, select **Screen Sharing** and choose one of the following options:

- Nearby Rooms
- Recent Rooms
- Find Other Rooms

2. Optional: Do one of the following:

- If prompted, enter the security code displayed on the connected monitor.
- Select **Menu** ☰ and enter the displayed security code.

Using the Calendar

Topics:

When connected to Microsoft Exchange Server, you can view and join meetings scheduled in Microsoft Outlook from your phone. If you have a device such as Poly Trio Visual+ paired to your Poly Trio system, you can connect to the call from the monitor as well.

Open the Calendar

To view and join scheduled meetings, access the calendar on your phone.

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

Procedure

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

On Trio 8300 systems, do one of the following:
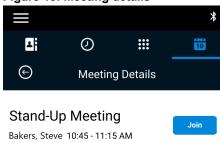
- Press **Home** ⌂ and select **Calendar**.
- Press the **Calendar** softkey.

The calendar displays scheduled meetings for the day.

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.

Figure 13: Meeting details
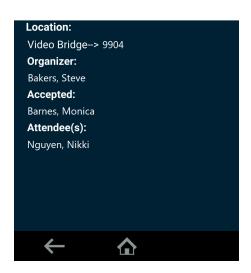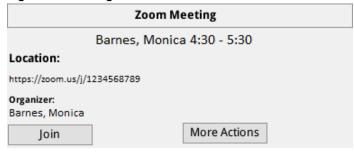
Figure 14: Meeting details on Trio 8300

Procedure

» On the calendar, select a meeting.

The meeting details screen displays.

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.
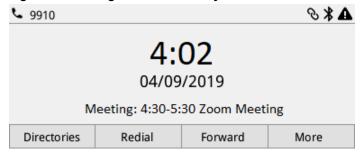
Figure 15: Meeting Reminder

Figure 16: Meeting Reminder on Poly Trio 8300 Home Screen

Note: If you have enabled meeting reminders but the reminders don't display before meetings, make sure that your login credentials are correct.

Choose a Meeting Reminder Type

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 doesn't 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

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. The phone displays reminders for all meetings. You can choose to disable meeting reminders on your phone.

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 the **Meeting Details** screen.

Procedure

» Do one of the following:

- From the calendar, select **Join**.
- In the **Meeting Details** screen, choose a meeting and select **Join**.

Join a Meeting from a Meeting Reminder

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. On the **Meeting Details** screen, choose a number.

Call Lists and Directories

Topics:

Poly phones support a recent calls list, a local directory, and a corporate directory.

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.

Recent Calls

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

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

View Recent Calls

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

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

   On the Trio 8300 systems, press the **Home** ⌂ key and select **Recent Calls**.

Edit a Recent Call Entry

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

Procedure
1. Next to a call entry, select **Info** ⓘ.

   On Trio 8300 systems, press the **Select** button or the **Info** softkey with the call entry highlighted.
2. Select **Edit** ✎.

On Trio 8300 systems, press **Edit/Dial**.
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, select **Info** ⓘ.

   On Trio 8300 systems, press the **Select** button or the **Info** softkey with the call entry highlighted.
2. On the **Call Details** screen, select **Save**.
3. Optional: 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 phone, the changes save to that phone only. If you delete call entries in the Skype for Business client, the changes save to that phone and in the Skype for Business client.

Procedure

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

   On Trio 8300 systems, press the **Select** button or the **Info** softkey with the call entry highlighted.
2. Select **Delete** ⊠.

Local Directory

Add and save contacts in the phone's Local Directory, if allowed 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

Search for a Local Directory Contact

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

Procedure

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

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're required to only enter a contact number for each new contact.

Procedure

1. Go to **Local Directory** > **Add** $+$.
2. On 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. Go to **Contacts** > **Local Directory**.
2. Choose a contact.

   The **Details** screen displays 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. In the **Local Directory**, select a contact.
2. On the **Details** screen, select **Edit** $\nearrow$.
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. In 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 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

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

Remove a Favorite

Remove a favorite contact to make room for a new favorite.

Procedure

1. Go 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 can't 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. Go to **Contacts** > **Corporate Directory**.
2. In the search field, enter your search criteria and select **Submit**.
3. Choose 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.

Procedure

1. Go to **Contacts** > **Corporate Directory**.
2. In the **Corporate Directory**, select **AdvFind**.

3. In the search field, enter your search criteria and select **Submit**.
4. Choose 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 automatically save to the directory. You can add additional contact information the contact in the directory afterward.

Procedure

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

Related Links

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 displays even with a blank search of the directory.

Search the BroadSoft Directory

Searching the BroadSoft directory allows you to search for contacts using either their first name, last name, or by typing a few letters of their name. You can view a maximum of 50 contacts at one time.

Procedure

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

   A default list of contacts displays.
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. Go to **Contacts** > **BroadSoft Directory**.

   A default list of contacts displays.
2. Select **Advanced Search** and choose how you want to search for a contact: by first name, last name, or a contact number.

3. Optional: Do one of the following:

- Select **Cs.Sn** to make the search case-sensitive.
- Select **Cs.In** to make the search case-insensitive.

4. In the search field, enter your search criteria and select **Submit**.
5. Choose your contact.

A contact details screen displays.

Add BroadSoft Contacts to the Local Directory

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

Procedure

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

The first and last name and phone number of the contact save to the contact directory. You can go to the contact directory to see if the contact saved correctly and to add additional contact information.

Voicemail and Pages

Topics:

-
-

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 the voicemail greeting or remotely accessing your voicemail, contact your system administrator or service provider.

Procedure

1. Go 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're subscribed to. By default, you're subscribed to groups 1, 24 (priority pages and broadcasts), and 25 (emergency pages and broadcasts).

How and when you receive a page or broadcast depends on the priority, whether you are in an active call, and if you enable Do Not Disturb. When you receive a page, the page always plays through the speakerphone.

Note: Your system administrator must enable a phone to receive pages while in an active call.

Your system administrator can define up to 25 paging groups. Each group receives a label to identify it from the others. Example group labels are All, HR Dept, Shipping Staff, and Executives.

Each group has one of the following broadcast priorities:

- Normal - Broadcasts sent to groups 1 to 23 are considered normal broadcasts. By default, all phones can 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 you enable Do Not Disturb.

- Emergency - By default, broadcasts sent to group 25 are considered emergency broadcasts. An emergency broadcast interrupts normal broadcasts, priority broadcasts, and active calls. Emergency broadcasts play at near maximum volume, even if you enable Do Not Disturb.

Note: When you enable Do Not Disturb, you receive only emergency broadcasts, and non-emergency broadcasts don't play or display.

Listen to a Page During an Active Call

Pages received during an active call defer or automatically play depending on the page priority.

Pages received during an active call don't interrupt the call. The phone plays audio from both the call and the page at the same time. When you receive a page during a call:

- If configured by your administrator, standard priority pages play during active calls. Otherwise, the page displays on your phone as pending.

- Priority and emergency pages play immediately.

Note: If you adjust the volume of a normal, nonemergency page while it plays, the phone uses the adjusted volume for all subsequent nonemergency pages. However, only your system administrator can change the volume of an emergency page.

Procedure

» Do one of the following:

- For normal pages that play automatically during a call, hold the call to hear only the page.

- For pending pages, select **Accept** or hold the call to listen to the page.

Receiving Pages When Not in an Active Call

When you receive a page and you aren't in an active call, the page immediately plays, regardless of the paging priority.

While a page plays, you can do the following:

- 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 pair Bluetooth-enabled devices to Trio 8800 systems using Near Field Communication (NFC).

When you connect a device to the Poly Trio system, you can use the system hardware for the connected device audio and calling functions.

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 doesn't automatically reconnect to previously paired Bluetooth devices after the device disconnects from the system or after a system reboot. You must manually reconnect and pair the Bluetooth device with the system.
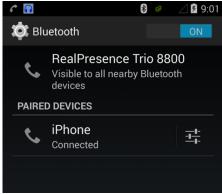
Related Links
[Place a Call over Bluetooth](#) on page 30

Make the System Visible to Nearby Bluetooth Devices

Before you connect a Bluetooth device to a Poly Trio system, make sure that the system is visible to nearby devices. This also applies if you're connecting a Bluetooth device to a Trio 8800 system via NFC.

Procedure
1. On the **Home** screen, select **Bluetooth**.
2. Make sure the statement `Visible to all nearby Bluetooth devices` displays below the system name.

3. If the statement `Only visible to paired devices` displays, select the system's name.

    The system is now visible to all nearby Bluetooth devices.

Make the Trio 8300 System Visible to Nearby Bluetooth Devices

Before you connect a Bluetooth device to a Trio 8300 system, make sure the system is visible to nearby devices.

Make sure Bluetooth is turned on on the system and your device.

Procedure

1. Press **Home** 🏠 to launch the main menu.
2. Go to **Settings** > **Basic** > **Bluetooth Settings** > **Discoverable**.
3. Select **On**.

The **Bluetooth Settings** > **Discoverable** setting changes to **On**, and nearby Bluetooth devices can find the Trio 8300 system.

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 or fewer as set by your system administrator.

Procedure

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

> **Note:** You can't connect to a Bluetooth device when you are in a call.

Connect a Bluetooth Device Using NFC

You can connect a Trio 8800 system to a Bluetooth-capable mobile phone or tablet using Near Field Communication (NFC) to play the audio from calls or media, such as music or videos, on the system.

Note: The Trio 8300 and Trio 8500 systems don't 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 Poly Trio system.
3. Confirm that your device is paired and connected to the system.

Play Audio from a Bluetooth Device

Use your phone 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 phone.

2. On your mobile phone or tablet, choose the music or video you want to hear.
3. Make sure that the phone 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. With the USB connection, you can use the phone as a microphone for calls and as a speaker for audio calls or media.

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

Related Links

Minimum Hardware and Software Laptop Requirements

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

Minimum Hardware and Software Requirements for the Connected Laptop

Component	Requirement
Operating system	• Windows 10 (32-bit or 64-bit)
	• Windows 8.1 (32-bit or 64-bit)
	• Windows 8 (32-bit or 64-bit)
	• OS X 10.9.x (Mavericks)
	• OS X 10.10.x (Yosemite)
	• OS X 10.11.x (El Capitan)
	• OS X 10.12.x (Sierra)
Desktop client or application	• Polycom RealPresence Desktop
	• Skype for Business

Connect a USB Device or Laptop

When you connect your Poly phone to a laptop or mobile device, you can use it as a microphone and speaker.

Procedure
» Connect your laptop or device to the micro USB port on the side of the phone.

Use Poly Trio as Your Computer's Speaker and Microphone

You can connect your computer to a Trio 8500 or 8800 system to use the Poly Trio system's microphones, speakers, and connected cameras as playback and recording devices for your computer.

Go to the support page for your Poly Trio model at [Polycom Support](#). Download the **Poly Trio Pass-through For Windows 10** application and install it on your computer.

Procedure

1. Open the **Poly Trio Pass-through For Windows 10** application.
2. Connect the USB cable from the Poly Trio system to your computer.

   The application displays the connection status.

After your computer connects with the Poly Trio system, choose which playback and recording devices from the Poly Trio system to use for calls placed on your computer.

Setting Your Phone as the Audio Device

Set the phone as your audio communication device to use your phone to play call audio from your communication and collaboration clients or media from your connected laptop.

Setting the Phone as Your Audio Device for Communication Clients

With your laptop connected to the phone, you can set the phone as your microphone and speakers for communication and collaboration clients.

Depending on the capabilities of the client, you can use the phone controls to accept, hold, 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 Phone as Your Audio Device in RealPresence Desktop

You can set the connected phone hardware as your microphone and speakers for RealPresence Desktop calls you place on your laptop.

If you don't have the RealPresence Desktop application, download it from the [RealPresence Desktop](#) support page.

Procedure

1. In RealPresence Desktop, go to **Settings** ⚙ > **Audio Device**.
2. Select your phone from the **Audio input device (microphone)** and **Audio output device (speakers)** drop-down menus.
3. Select **OK**.

Set the Phone as Your Audio Device for Skype for Business

You can set the connected phone hardware as your microphone and speakers for Skype for Business calls you place on your laptop.

Procedure

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

Set Your Phone as the Default Audio Device for Your Windows Laptop

You can set the connected phone as the default audio device to play media audio from your Windows laptop using the phone's speakers.

Procedure

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

Poly Trio Phone Settings

Topics:

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

You may need a password to configure basic settings on your phone.

You can enable or customize your phone from the **Basic** settings menu. However, your system administrator may require a password to access the settings menu. If your phone requires a password to access the settings menu, contact your system administrator for assistance.

Time and Date Display

The time and date display in the status bar.

When the phone can't 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.

Change the Time and Date Format

Customize the time and date by choosing between several time and date formats, including options to display the day, month, or year.

Procedure
1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Time and Date** and choose one of the following:
   - Select **Clock Date** to change the date format.
   - Select **Clock Time** to change the time format.

Disable the Time and Date Display

If desired, turn off the time and date display.

Procedure

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

Set the System Language

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

Check with your system administrator to find out which languages your phone supports.

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

If desired, 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's activity.
- **Backlight Idle**: The brightness of the screen when there's no activity.
- **Maximum Intensity**: The brightness scale that applies to both Backlight On and Backlight Idle intensities.

Related Links

Users Who Are Blind, Have Low Vision, or Have Limited Vision on page 25

Set the Backlight Intensity

The screen's backlight intensity settings adjust how bright the screen illuminates while on and while idle.

Set the **Backlight On** intensity and the **Backlight Idle** intensity separately. Choose an intensity level 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** 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 sit 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. Choose the number of seconds the phone is idle before the backlight dims.

Enable or Disable Number Formatting

By default, the phone automatically formats phone numbers based on the number of digits you enter. For example, 11234567890 displays as +1 (123) 456-7890.

Procedure

1. Go to **Settings** > **Basic** > **Preferences**.

2. Select **Number Formatting**.

3. Select **Enable** or **Disable**.

Power Saving Mode

By default, Poly phones 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. The phone exits power saving mode if an event occurs—for example, if there is an incoming call or message. If you enable a screen saver, power saving mode still activates.

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 is 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 don't enter power saving mode while idle in the Bluetooth or Wi-Fi menus. To ensure that the system enters power saving mode, exit the **Bluetooth** or **Wi-Fi** menu.

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 **Basic** settings.
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. On 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

Update the period of time the phone is idle before the screen turns off.

You can specify different timeouts for office hours and nonoffice hours. By default, the setting for office hours is much longer than the setting for nonoffice hours.

You can also specify the amount of time the phone waits to go idle after you press a key or tap the screen (on touchscreen models). You can choose to set this time period longer than the other idle timeouts. This prevents power saving mode initiating when you use the phone.

Tip: Once you press a key or tap the screen (on touchscreen models), the phone uses the idle timeout period with the highest value.

Procedure

1. Go to **Basic** > **Power Saving** > **Timeouts**.
2. Configure the following options:
   - **Office Hours Idle Timeout**: The number of minutes (1 to 600) the phone waits during office hours before starting power saving mode.
   - **Off Hours Idle Timeout**: The number of minutes (1 to 10) the phone waits during nonoffice hours before starting power saving mode.
   - **User Input Idle Timeout**: The number of minutes (1 to 10) the phone waits after you press a key or tap the screen before starting power saving mode.
3. Select **Save**.

Change User Detection for Power Saving Mode

You can set the level of sensitivity that the system uses to detect users within its proximity.

When the Poly Trio system detects users in its vicinity, the screen remains active. Set the sensitivity to 0 to disable the user detection feature for either office hours or off-hours.

Procedure

1. Go to **Basic** settings.
2. Select **Power Saving** > **User Detection**.
3. Select **Office Hours Sensitivity** and enter sensitivity level (0 to 10) for office hours.

4. Select **Off Hours Sensitivity** and enter sensitivity level (0 to 10) for off-hours.
5. Select **Save**.

Control Which Device Plays Audio

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

Note: If you have a Polycom EagleEye Acoustic camera connected to your paired Poly 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 Poly Trio 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. Audio for audio-only calls plays on the Poly Trio system, while audio from video calls plays on the paired device.

   Note: You can adjust this setting while in a call.

Set a Ringtone for Incoming Calls

One 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. On the **Ring Type** screen, select a ringtone.
4. Optional: Select **Play** to hear the ringtone.

Related Links

Maintaining Your Phone

Topics:

-

When the phone isn't operating properly, 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.

View details about the issues from the **Warnings** screen.

Procedure

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

   The **Warnings** screen displays, listing any issues.

Reboot Your Phone

Your system administrator may ask you to reboot the phone to assist in troubleshooting.

Caution: Before you reboot the phone, contact your system administrator. Rebooting the phone requires an administrative password. If the phone is malfunctioning, you may be able to restore normal operation without rebooting it. Additionally, your system administrator may want to troubleshoot the phone before you reboot it. You don't need to reboot the phone to update its configuration.

Procedure

1. Go to **Settings** > **Basic**.
2. Select **Reboot Phone**.
3. Select **Yes**.

   The reboot process begins, and the process ends when the **Home** screen displays.

Update the Phone's Configuration

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

Procedure

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

   A confirmation message displays.
3. Select **Yes**.

   The configuration updates. The phone may reboot, depending on which settings you changed.

Test the Hardware

If you're experiencing issues with your phone, your system administrator may ask you to test the phone hardware.

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**
   - **Keypad Diagnostics**

Clean the Touchscreen

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

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

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

Procedure

1. Go to **Settings** > **Basic**.
2. Select **Screen Clean**.
3. Wipe the screen with the clean, dry, microfiber cloth.

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 phone. Do not use chemicals to clean the screen.

4. To enable the touchscreen, follow the onscreen instructions.

Troubleshooting

Topics:

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

No Video or Content Displays on the Monitor

Symptom:

The video or shared content from a paired Poly Trio Visual+, Poly Trio VisualPro, or RealPresence Group Series system doesn't display on the monitor.

Problem:

The Poly Trio Visual+, Poly Trio VisualPro, or RealPresence Group Series system may not be connected to your Trio system.

Workaround:

Check the peripheral's connection status and alert an administrator if needed.

Procedure

1. On the local interface, go to **Settings** > **Status** > **Networked Devices**.
2. Make sure that the paired device displays as **Connected**.

If the paired device isn't connected, contact your system administrator.

Missing Calendar and Meeting Notifications

Symptom:

The **Calendar** icon doesn't display on the **Home** screen, and the system doesn't display meeting reminders.

Problem:

The Poly Trio system doesn't have a functioning connection to the Microsoft server.

Workaround:

Check your system's connection status to the Microsoft server and alert an administrator if needed.

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

   If the status reads that it isn't connected to the server, contact your administrator.

Shared Content Doesn't Display

Symptom:

Shared content doesn't display on a room system connected with the Poly Trio system.

Problem:

The device sharing the content isn't connected to the same network as the room system.

Workaround:

Connect your device to the same network as the room system.

Camera Doesn't Respond in a Video Call

Symptom:

The camera you're trying to use in a video call doesn't respond.

Workaround:

If the camera paired with a Poly Trio system doesn't respond to any commands you issue to it, and it doesn't produce a video feed, please contact your system administrator.

Poor Audio Quality with External Microphones

Symptom:

The far end complains about poor audio quality coming from your Poly Trio system with external microphones.

Problem:

Physical obstructions, such as laptop computers, placed between the speaking meeting participant and the Poly Trio and/or the external microphones can result in poor audio quality for the far end.

Workaround:

Avoid placing anything between the meeting participants and the Poly Trio system and/or the external microphones.

Poor Video Performance on Poly Trio Visual+

Symptom:

You may experience the following video issues on a Poly Trio paired with a Poly Trio Visual+ that uses an HDMI connection:

- The video or shared content partially displays offscreen.
- Odd video elements, such as blank boxes or spaces, display on the monitor while idle.

Problem:

Using an unsupported HDMI cable prevents the Trio Visual+ from executing video settings properly.

Workaround:

Replace the HDMI cable with a Poly-supplied HDMI cable or one recommended for use with the Poly Trio system.

Poor Camera Performance When Using the Poly Trio Pass-through Application

Symptom:

Using a camera accessed with the Poly Trio Pass-through application produces a poor quality video feed.

Workaround:

Restart the pass-through session to stabilize the video feed.

Procedure

1. On the Poly Trio local interface, go to the **Camera Pass-through** session screen and select **Stop**.

2. On the **Home** screen, select **Start Pass-through**.

> **Note:** You may need to swipe to the next page of icons on the **Home** screen to find the **Start Pass-through** icon.

Call Audio from Bluetooth-Connected Phones Doesn't Come Through System Speakers

Symptom:

After pairing your phone to the Poly Trio via Bluetooth, the call audio from your mobile phone doesn't come through the system's speakers.

Problem:

The Poly Trio system isn't set as your mobile phone's audio device.

Workaround:

Set the Poly Trio system as your mobile phone's audio device.

> **Note:** The following procedure applies to most mobile phones. See your specific device's product documentation for more information.

Procedure
1. While in a call on your mobile phone, select the phone's audio source options or settings.
2. Select the Poly Trio system from the list.

Using an Approved Power Source

Symptom:

If your phone is having the following issues, check your power supply:
- The phone cannot connect to the network.
- The phone does not start up properly or continues to restart.

Problem:

If you connect the wrong power supply to your phone, such as the power supply for a different or older phone, it could damage the phone, the phone will not function as expected, and it can void your warranty.

Workaround:

Only use the power supply designed for your phone or check with your system administrator about using Power over Ethernet.

Set Log Levels

Your system administrator uses log files to troubleshoot issues with your phone and may ask you to set the level for log files.

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

Procedure

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

Reset the Phone to Factory Defaults

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

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