Polycom® RealPresence Trio™ Solution

Applies to Polycom® RealPresence Trio™8800 and Polycom® RealPresence Trio™ Visual+

Contents

Before You Begin

This *Polycom RealPresence Trio Solution User Guide* uses a number of conventions that help you to understand information and perform tasks.

See the *Polycom RealPresence Trio 8800 Regulatory Notices* for all regulatory and safety guidance.

Who Should Read this Guide?

This user guide contains overview information for the Polycom® RealPresence Trio™ 8800 audio conferencing system and the Polycom® RealPresence Trio™ Visual+ content and video accessory. This guide is intended for beginning users, as well as intermediate and advanced users who want to learn more about the solution's features.

Typographic Conventions

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

Typographic Conventions

Convention	Description
Bold	Highlights interface items such as menus, menu selections, window and dialog box names, soft keys, filenames, and directory names when they are involved in a procedure or user action. Also used to highlight text to be entered or typed.
Italics	Used to emphasize text, to show example values or inputs (in this form: *<example>*), and to show titles of reference documents available from the Polycom Support Web site and other reference sites.
Blue Text	Used for cross references to other sections within this document and for hyperlinks to external sites and documents.

Related Documentation

For additional information about the solution, view the following documents on the RealPresence Trio 8800 support page:

- **User Documents**:
  - ➢ *Quick Tips*—A quick reference on how to perform basic functions.
- **Setup and Maintenance Documents**:

> ➢ *Setup Sheet*—This guide describes the contents of your package, how to assemble the system or accessory, and how to connect the system to the network. The quick start guide is included in the solution package.

> ➢ *Administrator Guide*—This guide provides detailed information about setting up your network and configuring features.

> ➢ *Regulatory Notice*—This guide provides information for all regulatory and safety guidance.

You can also view **Feature Descriptions** and **Technical Notifications** on the Polycom Voice Support page. These documents describe workarounds to existing issues and provide expanded descriptions and examples for settings and features. You can find these documents on the Polycom Profiled UC Software Features and Polycom Engineering Advisories and Technical Notifications support pages.

Getting Started with Polycom RealPresence Trio 8800

Before you use the RealPresence Trio 8800, take a few moments to familiarize yourself with its features and user interface. This section details the system's components, the screen layout, and how to navigate the interface in the following sections:

● Overview of RealPresence Trio 8800

● RealPresence Trio 8800 Hardware

● Overview of User Interface

● Enter Information Using the Onscreen Keyboard

> **Note: Accessing features and options**
>
> As you read this guide, keep in mind that certain features are configurable by your system administrator or determined by your network environment, and some features may not be enabled or may operate differently on the system. Additionally, the examples in this guide may not directly reflect what is displayed or is available.

Overview of RealPresence Trio 8800

The RealPresence Trio 8800 is an innovative audio conferencing system added to the Polycom conference phone family. RealPresence Trio 8800 supports audio-only conference calls with Open-SIP voice platforms or in a Polycom with Microsoft® Skype™ for Business 2013 or 2015 Server environment along with point-to-point, bridge, and Skype for Business video calls.

When paired with RealPresence Trio Visual+content and video accessory, you can stream video and show content for all calls on the RealPresence Trio 8800.

RealPresence Trio 8800 Hardware

The following figure displays the hardware features on the RealPresence Trio 8800. The table lists each numbered feature shown in this figure.

RealPresence Trio 8800 hardware features

RealPresence Trio 8800 Hardware Feature Descriptions

Reference Number	Feature	Feature Description
1	Touchscreen	Enables you to select items and navigate menus on the touch-sensitive screen. Tap the screen to select and highlight screen items. To scroll, touch the screen, and swipe your finger up and down.
2	NFC	Enables you to connect a Bluetooth-capable mobile phone or tablet using Near Field Communication (NFC).
3	USB Port	Enables you to connect a USB flash or connect a computer using an USB cable to the system.
4	Device Port	Enables you to connect a mobile or table device to the system using a USB device cord.
5	Speaker	Provides audio for the ringer and speakerphone.
6	Mute key	Mutes the microphones during calls and conferences. The key glows red when activated.
7	Volume keys	Adjust the volume of the audio from the speakerphone and ringer.

Overview of User Interface

The RealPresence Trio 8800 has icons, status indicators, and screens to help you navigate the user interface and understand important information on the state of the solution. The following topics describe how to navigate the user interface:

- User Screens
- Icons and Status Indicators

User Screens

The following screens display on the RealPresence Trio 8800:

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

Home Screen

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

A Page Indicator shows at the bottom of the screen and indicates the page you are currently viewing. You can press and hold the Page Indicator to control how many icons display on the Home screen. The following figure shows the Home screen with the Page Indicator.

Home screen and Page Indicator
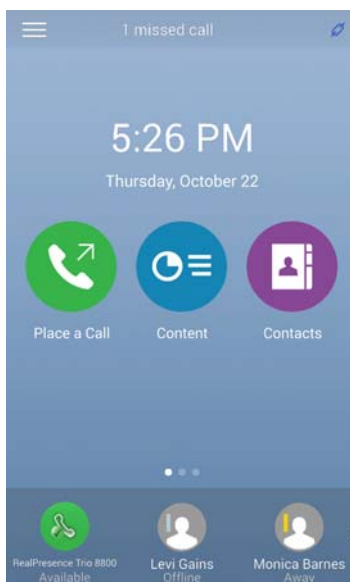
Display the Home Screen

You can display the Home screen from any screen or menu.

To view the Home screen:

» Tap ≡ and tap ⌂ **Home**.

Place a Call Screen

The Place a Call screen is displayed when you tap the Place a Call icon on the Home Screen or when the system is idle and not in use, if set by your system administrator. From the Place a Call screen, you can access the dial pad, Contacts, Recent Calls, and the Calendar, as shown in the following figure.

Place a Call screen

Calls Screen

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

Active call on the Calls screen
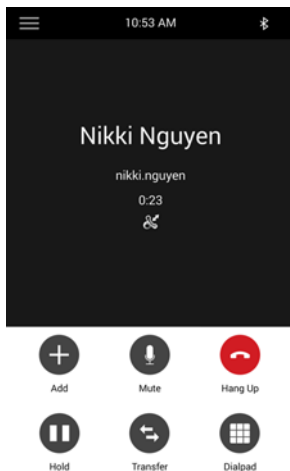
You can also view active and held calls in progress on the system, as shown next. Swipe the screen from the bottom to the top to view all the calls on the system. If the system has multiple lines, active and held calls display under the associated line.

Two calls on the Calls screen
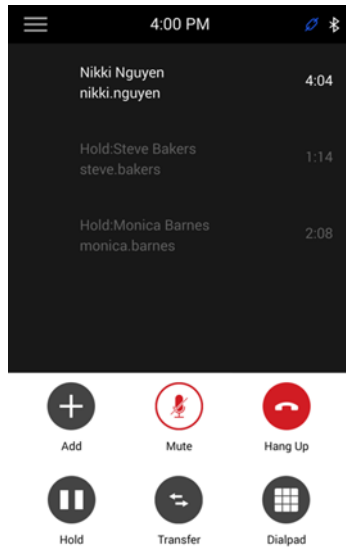
Icons and Status Indicators

The following tables display icons and status indicators that display on the RealPresence Trio 8800.

Icons and Status Indicators

Icon	Description	Icon	Description
	Registered line		Call signal
	Unregistered line		Do Not Disturb enabled
	Placing a call		Call forwarding is enabled
	Active call		Wireless status
	USB device attached		Encrypted call signal
	Bluetooth enabled		Paired device
	Bluetooth connected		Placed video call
	Placed audio call		Received video call

Icons and Status Indicators

Icon	Description	Icon	Description
📞	Received audio call	📹	Missed video call
📞	Missed audio call		

Enter Information Using the Onscreen Keyboard

The onscreen keyboard enables you to enter field information using the touchscreen, and is displayed on screen automatically when a text field is shown. When a data entry field requires only numbers, the onscreen keyboard displays only numbers.

You can use the following icons on the onscreen keyboard to enter information in text fields:

- ⌨ ABC Shows alphabetical letters
- ⇧ Shifts to uppercase letters.
- ⬆ Shifts to lowercase letters
- ?123 Displays numbers and punctuation marks
- =\< Displays special characters

To access and use the onscreen keyboard:

1 Tap a text field.
2 Press your finger on each character you want to enter.
3 When finished, tap **Done**.

Close the Onscreen Keyboard

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

To close the onscreen keyboard:

» Tap **Done**.

Logging Into and Locking RealPresence Trio 8800

You can lock the RealPresence Trio 8800, log in to the system with login credentials, and sign in to your Skype for Business account. This section includes the following topics:

- Log Into the RealPresence Trio 8800
- Sign Into Skype for Business
- Locking the RealPresence Trio 8800

If your system administrator has set up user credentials for the system, you can view personal settings from any system that is part of your organization. You can log into the system by entering your user ID and password, and access your Local Directory, favorites, and custom settings. Contact your system administrator for your user credentials.

When you change settings while logged in to the system, the settings are saved and displayed the next time you log into another system.

> **Note: Placing a call from a logged out system**
> When the system is logged out, you can use the system to place emergency calls and calls to other pre-determined phone numbers. Pre-determined numbers are set up by your administrator. For information on how to place authorized calls, see Place Calls from a Locked or Logged Out System.

Log Into the RealPresence Trio 8800

Depending on how your system administrator set up the user login feature, you may need to log in to the RealPresence Trio 8800 before you can use the system. By default, you do not need to log into the system before you can use them. However, if you do not log in, you see the system's default profile. When you log in, you have full access to your personal settings and your directory. After you log out, you can no longer view this information.

To log into the system:

1 Do one of the following:
    - If you see the **User Login** screen, proceed to step 2.
    - If you do not see the **User Login** screen, navigate to **Settings > Features > User Login > Log In**.

2 From the **User Login** screen, enter your user ID and password, and tap **Log In**.

   When your login credentials are accepted, the system updates to display your personal profile. When your credentials are not accepted, the message "User login failed" is displayed, and the User Login screen is displayed again. Check with your system administrator to confirm that your login credentials are correct.

Log Out of the System

After you use a RealPresence Trio 8800, make sure you log out to prevent access to your personal settings.

To log out of the system:

1 Tap **Log Out**, or select **Settings > Features > User Login > Log Out**.

The **Logout** screen is displayed with a confirmation message.

2 Select **Yes**.

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

Change Your Password

You can change your password from any RealPresence Trio 8800.

To change your user password:

1 Log in to a system on your network.

2 Navigate to **Settings > Features > User Login > Change User Login Password**.

3 From the **Change User Login Password** screen, enter your old and new password information, and select **Enter**.

Your password is changed. The next time you log in to a RealPresence Trio 8800, you need to enter your new password.

Sign Into Skype for Business

You can sign into Skype for Business on the RealPresence Trio 8800 with your login credentials—your domain, e-mail, username, and password—or your PIN authentication, if enabled by your administrator. Your system administrator provides you with your login credentials or PIN authentication.

To sign into Skype for Business on the system:

1 Tap **Sign In**, or navigate to **Settings > Features > Microsoft Skype for Business > Sign In**.

2 Enter your login credentials or the system extension and PIN.

A confirmation message is displayed when the system successfully signs into Skype for Business.

Troubleshooting: I can't log in using my login credentials.
If you input the wrong login credentials or PIN authentication and lock your account, contact your system administrator.

Set the Time and Date Format

After you sign into the system with your Skype for Business credentials, you have the option to set the time zone and select a time and date format. If you do not choose to set the time and date when you first sign in, you can view the section Set the Time and Date Display for more information on setting the time and date formats.

To set the time and date format after signing into Skype for Business:

1   After you sign into Skype for Business, select **Next**.

2   On the Customize Time Zone screen, select your time zone and press **Next**.

3   On the Customize Time Format, choose a time format and press **Next**.

4   On the Customize Date Format screen, choose a date format and press **Next**.

Sign Out of Skype for Business

Make sure you sign out of your account after you finish using the system. After you sign out of Skype for Business, you cannot call or view your Skype for Business contacts, but you can still use other features.

To sign out of Skype for Business:

» Tap **Sign Out** or navigate to **Settings > Features > Microsoft Skype for Business > Sign Out**.

Locking the RealPresence Trio 8800

Your system administrator provides you with a user password that you can use to unlock the system and use to answer calls when the system is locked.

When the system is locked, you can:

● Make outgoing calls to authorized numbers only.

● Enter a password to answer incoming calls.

● View messages on the status bar informing you that the system is locked and that only authorized calls are allowed. Any messages that displayed before the system was locked do not display.

The following figure shows the Home screen when the system is locked.

Locked Home screen

Lock the System

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

- *Allow 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 does not ring for incoming calls (see the section Enable Do Not Disturb).

To lock the system:

1 Navigate to **Settings > Basic > Lock Phone**.
2 From the **Lock Phone** screen, select **Allow ringing when locked** (the default setting) or **DND when locked**.

   When you choose this option, you can answer a call by entering your password.
3 Select **Lock**.

When you set up the system to allow you to answer incoming calls when locked, you can answer calls by entering your user password. See the section Answer Calls on a Locked System for more information.

Unlock the System

You can unlock the system using your user password.

To unlock the system:

1 Tap **Unlock**.
2 Enter your user password and tap **Enter**.

Change Your User Password

To change your user password, you need access to the Advanced settings menu, which is password-protected. Contact your administrator for help with accessing Advanced settings and changing your user password.

To change your user password:

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

Managing Audio Calls

The RealPresence Trio 8800 system provides crystal clear voice quality audio for you and your contacts during calls. RealPresence Trio 8800 enables you to place and answer SIP calls, decline incoming calls from all or individual contacts, place and manage conference calls, and manage calls on shared lines.

This section includes the following topics:

- Placing and Answering Audio Calls
- Holding and Resuming Calls
- Managing Multiple Calls
- Decline Incoming Calls
- Enable Do Not Disturb
- Forwarding Incoming Calls
- Forwarding Incoming Skype for Business Calls
- Change the Volume

Placing and Answering Audio Calls

RealPresence Trio 8800 can manage a maximum of 24 active, incoming, and held audio calls at a time. However, you can have only one active call in progress with numerous other incoming calls or calls on hold.

For OpenSIP environments, your system administrator can set up the system to have up to six lines with unique extension numbers or the same extension number as other lines on your network. For Skype for Business environments, the system can only have one registered line.

This section includes the following topics:

- Placing Audio Calls
- Redial a Number
- Answer Audio Calls
- Mute Audio
- End Audio Calls

Placing Audio Calls

You can place audio calls on the RealPresence Trio 8800 in numerous ways, including placing international calls, placing calls from Recent Calls, placing calls to contacts or favorites, or calling authorized numbers on a locked system. If enabled, you can also place calls over Bluetooth or an intercom call to a specified contact.

Place Calls from the Dialer

The Dialer enables you to enter a number or IP address to place a call using the dial pad or onscreen keyboard ⌨️ .

The Dialer
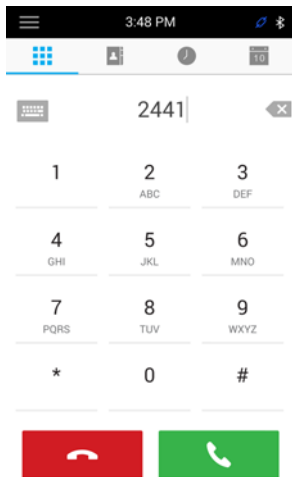
To place a call from the Dialer:

1 Do one of the following:
> ➢ Tap **Place a Call**.
> ➢ Tap a line key.

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

3 Tap 📞 .

Place an International Call

You can place calls to international numbers from the Dialer.

To place an international call:

1 In the **Dialer**, quickly tap the **star key *** twice.

A plus sign + is displayed.

2 Enter the number and tap 📞 .

Place Calls from Recent Call Lists

In addition to the Dialer, you can place calls from the Recent Calls list, which has calls that were recently placed, answered, or missed. See the section View Recent Calls for more information on recent calls.

To place calls from the Recent Calls list:

1 Navigate to **Recent Calls**.

    2 From the **Recent Calls** screen, select a contact.

        The call is automatically placed after you select a contact.

Placing Calls to Favorites

You can place a call to favorites by selecting a favorite on the Home screen. Contacts you add as favorites display at the bottom of the Home screen, as shown in the following figure.

See the section Add Favorites for information on adding Favorites.
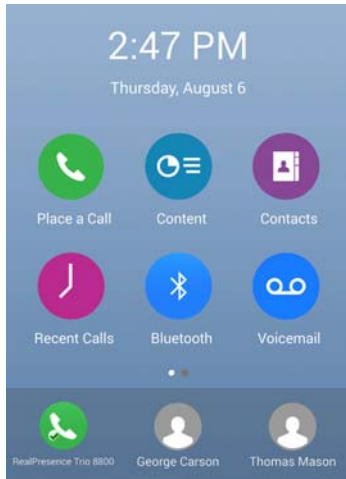
To place a call to a favorite:

    » On the Home screen, tap a favorite.

        A call is placed to the favorite automatically.

Place Calls from Directories

You can place a call to a contact directly from one of the directories available on the system or you can select contacts to call in the directory from the Place a Call screen.

To call a contact from a directory:

    1 Do one of the following:

        ➢ Navigate to **Contacts** and select a directory.

        ➢ Navigate to **Place a Call**, tap 🔳, and select a directory.

    2 Select a contact.

    3 From the **Details** screen, tap 📞 next to the number you want to call.

Place a Call from the Directory Search Screen

You can also call contacts from the search screen in your directory.

To call contacts from the directory search screen:

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

2 In the Search field, enter your contact's first or last name.

3 Select your contact.

4 In the **Details** screen, tap 📞 next to the number you want to call.

Place Calls to Skype for Business Contacts

When you are signed into Skype for Business on the system, any contacts you add as favorites in the Skype for Business client display on the system in the Contacts list, and you can call your Skype for Business favorites from the system.

To place a call to Skype for Business contacts:

1 Do one of the following:

   ➢ Navigate to **Contacts > Contacts**.

   ➢ Navigate to **Place a Call** and tap 👤.

2 Select a contact and tap **Dial**.

Place a Skype for Business Audio Call over USB

When the RealPresence Trio 8800 system is connected to a computer with the Skype for Business client, you can use the system as the audio device for your Skype for Business calls. You can also hold, resume, and mute your audio for Skype for Business calls from the system.

To place a Skype for Business audio call:

1 In the Skype for Business client, do one of the following:

   ➢ Click 👤 and scroll to the contact you want to call.

   ➢ Enter your contact's name in the search box.

2 Right-click on the contact and click **Call > Skype for Business Call**.

Place Calls from a Locked or Logged Out System

When the RealPresence Trio 8800 is locked or you are not logged in to the system, you can place calls only to emergency numbers, such as 911, and up to five authorized numbers that your administrator can set up, as shown next. You cannot call any other numbers from a locked or logged out system. See the section Logging Into and Locking RealPresence Trio 8800 for more information.
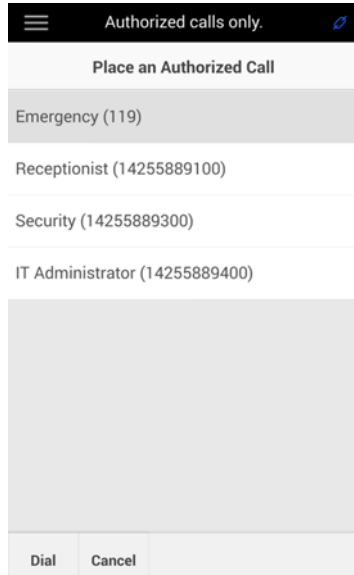
To call an authorized number from a locked or logged out system:

  1 Tap **New Call**.

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

Place an Intercom Call

The intercom on the system enables you to place a call to a contact that is answered automatically on the contact's phone. The intercom call is automatically answered only if the contact is not in an active call. If the contact is in an active call, the contact can choose to answer the intercom call, or the intercom call is answered automatically after the active call ends. Check with your system administrator to find out if this feature is available on the system.

To place an intercom call:

  1 From the Home screen, select **Intercom**.

  2 Enter a number or select a contact from Contacts, Favorites, or Recent.

  3 Tap   .

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

  4 Speak your message and wait for a reply.

  5 If you do not need to wait for a response, tap **Hang Up** .

> **Tip: Quickly call a contact using the intercom**
> Your system administrator can set up the system to automatically call a specific contact when you press the Intercom soft key. If the system is set up this way, press the Intercom soft key and wait for the call to be answered before speaking your message.

Place an Intercom Call during a Call

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

To use the intercom during a call:

1 Select **Hold**, and select the **Intercom** soft key.

   The active call is placed on hold and the **Dialer** screen is displayed.

2 Enter a number or select a contact.

3 Tap .

4 After the call is answered, speak your message and select **Hang Up**.

5 Select **Resume**.

Place a Call over Bluetooth

When the RealPresence Trio 8800 is paired and connected with a Bluetooth-enabled mobile phone or tablet, you can place a call on your device and use the system as a speakerphone for the call. See the section Connecting Devices to the RealPresence Trio 8800 for information on connecting and pairing your device with the RealPresence Trio 8800.

To place a call over Bluetooth:

1 Connect your device with the RealPresence Trio 8800 over Bluetooth.

2 On your device, place a call to a contact.

3 On the call screen, select the RealPresence Trio 8800 as your audio source, as shown on an iPhone in the following graphic.
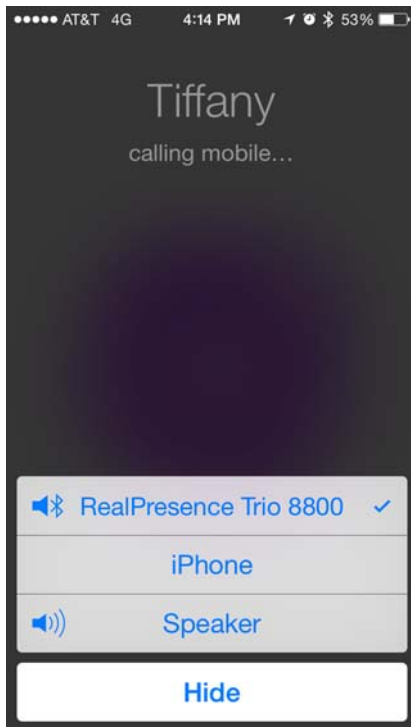
Redial a Number

All recently placed calls are displayed in the Recent Calls list. The first number in the list is the last call you placed.

To redial a number:

1 Select **Place a Call** and tap 🕐 .

2 From Recent Calls, select the first number in the list.

Answer Audio Calls

When you receive an incoming call on the system, you can choose to answer the call in various ways. This section includes the following topics on answering calls:

● Answer Calls in the Incoming Call Window

● Answer a Call When in a Call

● Answer Calls Automatically

● Answer Calls on a Locked System

● Answering Intercom Calls

Answer Calls in the Incoming Call Window

When you receive an incoming call, the system rings and an Incoming Call screen is displayed, as shown next. In the Incoming Call screen, you can choose to answer or ignore the incoming call.

Incoming Call screen

>
> **Note: Setting up a visual incoming call alert**
> Your system administrator can enable the screen to flash bright orange when you have an incoming call. The screen continues to flash until the incoming call is displayed in the Home or Calls screen. For more information about this feature, see your system administrator.

To answer an incoming call:

» Tap **Answer** .

After you answer the incoming call, the call becomes active.

>
> **Note: Answering calls when the system is locked**
> If the system is locked, you must enter a user password before answering the call. See the section Answer Calls on a Locked System.

Answer a Call When in a Call

When you are 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 window is displayed.

To answer an incoming call during a call:

» Tap **Answer** 📞.

The active call is placed on hold, and the incoming call becomes active.

Answer Calls Automatically

You can set up the system to automatically answer calls using the Auto Answer feature. When this feature is enabled, the system automatically answers all incoming calls using the speakerphone. Your system administrator sets how many times the system rings before the call is automatically answered.

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

To enable the system to automatically answer calls:

1   Navigate to **Settings > Basic > Preferences > Auto Answer**.

2   From the **Auto Answer** screen, select **Auto Answer SIP Calls**, and select **Yes**.

3   Select **Microphone Mute**, and choose **Yes** (the default setting) to mute the microphone for auto-answered calls.

4   Select **Video Mute**, and select **Yes** to mute the video when video calls are auto-answered.

The default setting is No. See the section Managing Video Calls for more information on placing video calls.

5   Select **Save**.

These settings are applied to all incoming calls.

Answer Calls on a Locked System

When the system is set up so that you can answer incoming calls when locked (see the section Locking the RealPresence Trio 8800), you can answer calls by entering your user password.

To answer a call on a locked system:

1   From the Incoming Call window, tap **Answer** 📞.

2   Enter your user password and select **Enter**.

The call connects.

Answer Skype for Business Calls on a Locked System

On systems registered with Skype for Business, you can answer incoming calls without unlocking the system. However, when you answer a call without unlocking the system first, you cannot perform additional call actions, such as hold, resume, or transfer calls, until you unlock the system. The only soft keys available during the call are the End Call and Unlock soft keys.

You can unlock the system at any time during the call.

To answer Skype for Business calls on a locked system:

» Select **Answer**.

Answering Intercom Calls

When you receive an intercom call on the system, the call is answered automatically using the speakerphone. If the system is set up to answer intercom calls with your microphone muted, you need to unmute your microphone before responding to the call.

To respond to an intercom call with mute enabled:

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

Mute Audio

You can mute the microphone so other parties cannot hear you. You can still hear all other parties when you mute your microphone.

To mute the microphone:

» During a call, do one of the following:
  ➢ Tap **Mute** .
  ➢ Tap the Mute key on the system.
  ➢ Tap the Mute key on the microphone.

Unmute Audio

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

To unmute the microphone:

» During a call, do one of the following:
  ➢ Tap **Unmute** .
  ➢ Tap the Mute key on the system.
  ➢ Tap the Mute key on the microphone.

End Audio Calls

You can end an active call on the system at any time.

To end active calls:

» Do one of the following:
  ➢ Tap **Hang Up** .
  ➢ In the Calls screen, select the call and tap **Hang Up** .

End Held Calls

You cannot end calls on hold. You must resume held calls before ending them.

To end a held call:

» From the Calls screen, select the held call and tap Resume ⏸ then tap **Hang Up** ⏷.

Holding and Resuming Calls

When you are in a call, you can place an active audio or video call on hold and resume the call. When you place a call on hold, the Mute key indicators on the system and microphones are red. When you are placed on hold, the Mute key indicators on the system and microphones flash green.

Hold Calls

You can place any active audio or video call on hold.

To hold a call:

» During an active call, tap **Hold** ⏸. If you're in the Calls screen, be sure to highlight the call first.

The Resume ⏸ soft key is displayed.

Resume Calls

You can view and resume all held calls in the Calls screens.

To resume a held call:

» Do one of the following:

➢ Tap Resume ⏸.

➢ From the Calls screen, select the call to highlight it, and tap Resume ⏸.

Transferring Calls

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

● *Blind transfer*   Transfer calls directly to another line without speaking with the other party first.

● *Consultative transfer*   Speak with the other party before completing the transfer.

Choose a Default Transfer Type

You can choose a default transfer type to use for all calls or choose a transfer type during a call. When you choose a default transfer type, you can press the Transfer soft key, and the system uses the set transfer type for all calls. Consultative is set as the transfer type by default.

To set a default transfer type for all calls:

1 Navigate to **Settings > Basic > Preferences > Default Transfer Type**.

2 On the **Default Transfer Type** screen, choose a transfer type.

The selected transfer type is used for all calls.

Transfer a Call

You can transfer a call to another contact and choose the transfer type you want to use for the call.

To transfer a call:

1   During a call, tap **Transfer** ⇆ to use the default transfer type.

2   Dial a number or choose a contact from Contacts or Recent Calls.

   If the default transfer type is set to Blind, the call is transferred immediately.

3   If the transfer type is set to Consultative, press **Transfer** ⇆ after speaking with your contact.

Cancel a Transfer

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

To cancel a transfer before the call connects:

»   Select **Cancel**.

   The call is not transferred and becomes active.

Managing Multiple Calls

You can manage multiple calls that are active, incoming, or held on the system. In the Calls screen, you can view active and held calls, including conference calls. The following figure shows an active call and a held conference call.
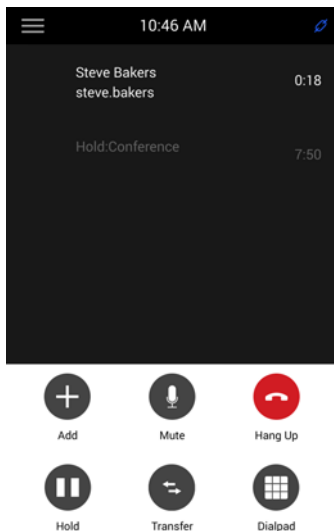
Manage Calls from the Calls Screen

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

To manage a call from the Calls screen:

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.

Decline Incoming Calls

You can decline an incoming call and send the call directly to voicemail. Declined calls display in the Missed Calls list in Recent Calls. Rejecting calls is not available for shared lines.

To decline an incoming call:

» From the **Incoming Call** window, select **Decline** 📞.

   The call goes directly to voicemail.

Enable Do Not Disturb

You can enable Do Not Disturb (DND) to prevent the system from ringing and to send all incoming calls directly to voicemail. All calls received while DND is enabled are logged in the Recent Calls list.

When you enable DND, the following occurs:

● The DND icon 📞 is displayed in the status bar.

● When the system is idle, the DND icon is displayed next to the line on the Home screen. If you have new messages or forwarding enabled, the messages or forwarding icon is displayed instead.

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

To enable or disable Do Not Disturb:

» Navigate to **Settings > Features > Do Not Disturb**, and tap **Enable**.

Enable Do Not Disturb on Multiple Lines

By default, the Do Not Disturb feature applies to all lines on the system. Your system administrator can set up the system so that you can enable the feature on a per-line basis.

To automatically enable Do Not Disturb for all lines:

1 Navigate to **Settings > Features > Do Not Disturb**.

2 Select **Set All** to enable DND for all lines.

Enable Do Not Disturb for One Line

If enabled, you can choose to enable DND for a particular line and not all lines.

To enable Do Not Disturb for a particular line:

1 Navigate to **Settings > Features > Do Not Disturb**.
2 From the **Line Select** screen, select a line.
3 From the **Do Not Disturb** screen, tap **Enable**.

Disable Do Not Disturb

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

To disable Do Not Disturb:

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

Forwarding Incoming Calls

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

> **Note: Call Forwarding and Microsoft Skype for Business Server**
> If you are signed into Skype for Business, your call forwarding options are different than those described below. For more information on forwarding Skype for Business calls, see the section Forwarding Incoming Skype for Business Calls.

Forward an Incoming Call to a Contact

You can forward an incoming call directly to a contact without answering the call. You cannot forward calls in this way on shared lines.

To forward an incoming call to a contact:

1 In the **Incoming Call** screen, tap ☰ then tap **Forward**.
2 From the **Call Forwarding** screen, enter the forwarding number, and tap **Forward**.

Forward All Incoming Calls to a Contact

You can set up the system to forward all incoming calls to a contact, which you can also do with the Do Not Disturb feature enabled.

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

To forward all incoming calls to a contact:

1 Navigate to **Settings > Features > Forward**.

2 If the system has multiple lines, select a line.

3 From the **Forwarding Type Select** screen, select a forwarding type:

➢ **Always**   Forwards all incoming calls.

➢ **No Answer**   Forwards all unanswered incoming calls.

➢ **Busy**   Forwards incoming calls when you're in a call.

4 Enter a contact's number, and select **Enable**.

5 If you selected the **No Answer** option, you can enter the number of rings before the system forwards the call. The default is set to nine.

The forwarding number or name of the contact you chose displays in the status bar, and when you select **Always** as your forwarding option, the forwarding icon ⛒ is displayed on the line.

Disable Call Forwarding

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

To disable call forwarding:

1 Navigate to **Settings > Features > Forward**.

2 If the system has multiple lines, select a line.

3 From the **Forwarding Type Select** screen, tap **Disable Call Forwarding**.

Forwarding Incoming Skype for Business Calls

When the system is registered with Skype for Business Server, you have more options for forwarding calls. Check with your system administrator to find out if this feature is available.

You can forward all Skype for Business calls to your line in the following ways:

● Forward Skype for Business Calls to a Contact

● Forward Calls to Voicemail

● Simultaneously Ring a Group of Contacts

Forward Skype for Business Calls to a Contact

You can set up the system to forward all incoming calls directly to a Skype for Business contact.

To forward all Skype for Business calls to a contact:

1 Navigate to **Settings > Features > Forward > Forward to a Contact**.

2 Do one of the following:

➢ Enter a contact's number and tap **Ok**.

➢ Tap **Search**, enter your contact's name, select your contact, and tap **Forward**.

➢ Tap **Contacts**, choose a contact from the Contact's list, and tap **Forward**.

A scrolling message showing that you have forwarded all incoming calls to your contact is displayed in the status bar.

Forward Calls to Voicemail

When you are signed into Skype for Business on the system, you have the option to forward Skype for Business calls to your voicemail.

Note: Forward to Voicemail option not available when voicemail is disabled

The Forward to Voicemail option for the Call Forwarding feature is available only when voicemail is enabled. If voicemail is disabled, you cannot select the Forward to Voicemail option.

To forward all Skype for Business calls to voicemail:

» Navigate to **Settings > Features > Forward > Forward to Voicemail**.

All incoming calls are sent directly to your voicemail.

Simultaneously Ring a Group of Contacts

You can choose to simultaneously ring a group of Skype for Business contacts when you receive incoming calls.

To simultaneously ring a group of contact for incoming calls:

1 In the Skype for Business client, click ⚙ and select **Tools > Call Forwarding Settings**.
2 Select **Simultaneously Ring > My Team-Call Group**.
3 In the **Call Forwarding – My Team-Call Group** dialog box, click **Add**.
4 In the **Choose a Team-Call Group Member** dialog box, select the contacts you want to add and click **Ok**.

The contacts you add as group members are displayed in the **Call Forwarding – Team-Call Group** dialog box.
5 Click the **Ring your team-call group after this many seconds** drop-down menu to determine when your contacts' phones ring.

Simultaneous ringing is enabled for all assigned team-call members. If your line receives an incoming call, everyone in the team-call group phones ring.

Change the Volume

You can increase the volume of the system's ringtone and the audio during a call.

To change the volume of the ringtone or audio during calls:

» Tap one of the Volume keys to increase or decrease the audio.

Initiating and Managing Conference Calls

You can initiate and manage up to 12 audio conference calls or 24 Skype for Business calls on the RealPresence Trio 8800. You can also place video conference calls with contacts and view video for up to six participants. See the section Managing Video Calls for more information on video calls.

The section includes the following topics on conference calls:

- Initiating and Managing Conference Calls
- Initiating and Managing Skype for Business Conference Calls

Initiating and Managing Conference Calls

You can initiate a conference call with four contacts and hold, resume, or split a conference call. The RealPresence Trio 8800 can manage a maximum of 12 active or held conference calls at a time. However, you can have only one active conference call in progress with numerous other conference calls on hold.

If your system administrator enables the Conference Management feature, you can manage each participant in the call. With the Conference Management feature, you can mute and remove individual participants in a conference call. For more information, see the section Manage Conference Call Participants.

> **Note: Initiating and managing Skype for Business conference calls**
> If you are signed into Skype for Business on the system, you have different options for initiating and managing Skype for Business conference calls. See the section Initiating and Managing Skype for Business Conference Calls for more information.

Tips for Conference Calls

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

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

Initiate Conference Calls

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

To initiate a conference call:

1 Call a contact.

2 After the contact answers, tap **Add** ✚.

The call is held.

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

The contact is added to the conference call after answering.

Add Additional Participants to a Conference Call

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

To add additional participants to a conference call:

1 During an active conference call, tap **Add Participant**.

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

The new contact is added to the conference call after answering.

Merge Calls into a Conference Call

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

To merge calls into a conference call:

1 In the calls screen, tap the held call.

2 Tap ☰ then tap **Merge Calls**.

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

End Conference Calls

By default, when you end a conference call, your connection to the call ends, and the other participants in the conference remain in the call. However, your system administrator can set up the system so that all connections terminate when you end a conference call.

To end a conference call:

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

Hold Conference Calls

When you place a conference call on hold, you place all conference participants on hold. To place one conference participant on hold, see the section Manage Conference Call Participants.

To place a conference call on hold:

» Tap **Hold** ⏸.

If you're in the Calls screen, highlight the conference first.

Resume Conference Calls

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

To resume a held conference call:

» Tap **Resume** (❚❚).

Manage Conference Call Participants

If your system administrator enables the conference management feature, you can mute and remove participants from the conference, as shown next.
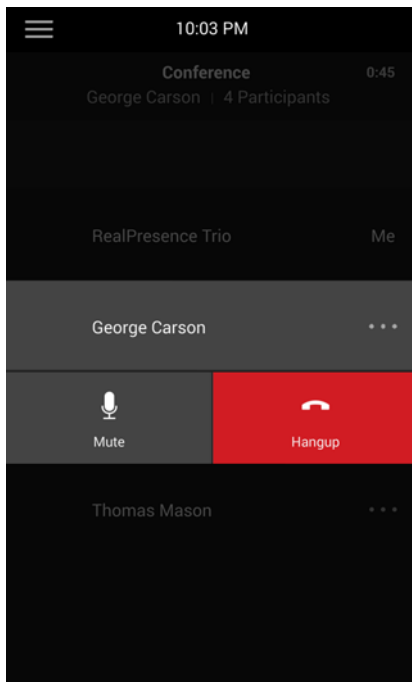
To manage a participant in a conference call:

1 During an active conference, select the participant you want to manage.
2 Do one of the following:
   ➢ Tap **Mute** 🎤 to mute the participant. The muted participant can hear everyone, but no one can hear the muted participant.
   ➢ Select **Hang Up** 📞 to remove the participant from the conference.

Initiating and Managing Skype for Business Conference Calls

When you are signed into Skype for Business on the RealPresence Trio 8800, you can initiate conference calls with your Skype for Business contacts from the system. You can also manage conference participants,

enable announcements, and lock a conference. You can manage a maximum of 24 Skype for Business conference calls at a time on the system. However, you can have only one active conference call in progress.

> **Note: Join Skype for Business conferences from the calendar**
> You can join Skype for Business conference calls from the calendar on the system, if enabled. See the section Join Skype for Business Meetings from the Calendar for more information.

Initiating a Skype for Business Conference Call

You can initiate a Skype for Business conference call on the system or in the Skype for Business client.

When all the participants are added to the conference call, the Participants list is displayed. In the Participants list, you can see all the conference participants and manage the list of participants. See the section Viewing a List of Conference Participants for more information.

Initiate a Skype for Business Conference Call

You can initiate a Skype for Business conference call, add and invite contacts to a conference call, and have up to 24 conference calls on the system.You can only select one contact at a time to add to the conference call.

To initiate a Skype for Business conference call on the system:

1 Tap **Meet Now > Add**.
2 Enter a contact's number or select a contact from Contacts or Recent Calls and tap **Dial**.

  The contact is added to the conference call.
3 Tap **Add Participants** to add additional contacts to the conference call.

Initiating a Group Conference Call

You can also initiate a Skype for Business conference call with all the contacts in a group on the system or in the Skype for Business client.

Initiate a Group Conference Call

You can initiate a group conference call with Skype for Business contacts on the system.

To initiate a Skype for Business conference call with a group on the system:

1 Tap **Contacts > Contacts** and select **Groups**.
2 On the **Groups** screen, select a group.
3 Tap **Dial All**.
4 Tap **Yes** to confirm that you want to dial all contacts in the group.

  Each contact in the group is called one at a time.

Initiate a Group Conference Call in the Skype for Business Client

When you initiate a group conference call in Skype for Business, the call displays in the Skype for Business client and on the system.

To initiate a conference call with a group in the Skype for Business client:

» Right-click a group and click **Start a Conference Call >** Skype for Business **Call**.

The call window is displayed with all of the invited contacts.

Initiate a Conference Call during a Call

During a Skype for Business call on the system, you can add contacts to the call to initiate a conference call.

To initiate a conference call during an active Skype for Business call:

1 Tap **Add** and enter the contact's number or select a contact from Contacts or Recent Calls.

2 Tap **Add Participants** to add additional contacts to the conference call.

Add Contacts to a Skype for Business Conference Call

During a conference call, all participants can invite additional contacts to the call.

To invite contacts to an active conference call:

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

2 Enter the contact's number or select a contact from Contacts or Recent Calls.

Send Contacts Active Conference Information

If you are a conference participant, you can send the conference dial-in number and PIN to contacts you want to join the call. You can view the conference contact information on the system during an active conference call.

To view the conference dial-in number and PIN:

» During an active conference call, tap ☰ and tap **Conference Information**.

The dial-in number and PIN for the conference is displayed.

When a contact dials into a conference using the conference dial-in number and PIN, the contact is added to the conference call immediately, unless the conference call is locked. When the conference call is locked, the contact must wait for the conference presenter to admit the contact to the call. See the section Lock and Unlock a Conference Call for more information.

Viewing a List of Conference Participants

When you initiate or join a conference call, the conference participants automatically display in a Participants List, as shown next. The Participants list displays only participants in the conference call; it does not display any calls on hold.

Participants list for a Skype for Business conference
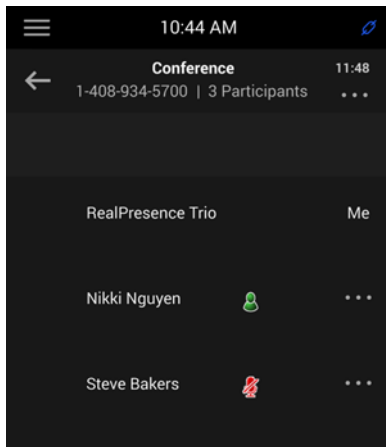
Exit the Participants List

You can exit the Participants list to view the Home screen or navigate to menu options.

To exit the Participants list:

» Tap ← .

Return to the Participants List

You can return to the Participants list at anytime during an active conference.

To return to the Participants list:

» Tap 👥 **Participants**.

Managing Skype for Business Conference Participants

When you initiate a conference call, you and all conference participants are listed as presenters. Conference participants with 👤 next to their names are presenters.

As a presenter, you can manage the call participants in the following ways:

- Mute all participants or individual participants
- Remove participants from the conference call
- Demote a presenter to an attendee or promote an attendee to presenter
- Enable or disable conference announcements
- Lock or unlock a conference

These options do not display for attendees.

Muting Conference Participants

Only presenters can mute and unmute conference participants.

If a presenter mutes your audio, a message is displayed on the RealPresence Trio 8800 or in the Skype for Business client, and a mute icon 🔴 is displayed next to each person who is muted. When a presenter mutes your audio in the Skype for Business client, it takes one second for the mute icon to display on the system.

You must wait for the presenter to unmute your audio before you can speak in the conference again.

Mute and Unmute All Conference Participants

Presenters can mute and unmute all conference participants at one time.

To mute and unmute all conference participants:

1 Tap the Conference name and tap **Mute All**.

A notification is displayed on the participants' phones informing them that the presenter has muted the audience.

2 Tap **Unmute All** to enable participants to speak in the conference.

A notification is sent to the participants' informing them that the presenter has unmuted the audience.

Mute and Unmute Individual Participants

Presenters can choose to mute and unmute individual participants during conferences.

To mute and unmute an individual conference participant:

1 Select a participant and tap **Mute**.

A notification is displayed on the participant's phone informing him or her that the presenter has muted the participant.

2 Select the muted participant and tap **Unmute**.

A notification is displayed on the participant's phone informing him or her that the presenter has unmuted the participant.

Demote or Promote Conference Participants

Presenters can promote conference participants from an attendee to a presenter, or demote conference participants from a presenter to an attendee.

To promote or demote conference participants:

1 Select a conference participant and tap ≡.
2 Do one of the following:
   ➢ Tap **Host** to promote a participant to presenter.
   ➢ Tap **Attendee** to demote a presenter to attendee.

   The participant is now a presenter who can manage conference participants, or an attendee.

Enable and Disable Conference Announcements

When enabled, announcements play whenever a presenter mutes or unmutes the audience, locks or unlocks the conference, and removes a conference participant, or when a new person joins the conference. Presenters can choose to enable or disable announcements during a Skype for Business conference call.

To enable or disable conference announcements:

» During a conference call, tap ☰ and tap **Enable Announcements** to enable announcements or **Disable Announcements** to disable announcements.

Remove Conference Participants

A presenter can remove any participant, excluding the conference host, from the conference call.

To remove conference participants:

» In the Participants list, select a participant and tap **Hang Up**.

A notification is displayed on the participant's phone informing him or her that the presenter has removed them from the conference.

Lock and Unlock a Conference Call

Presenters can lock a conference call to prevent other people from joining the conference call without a presenter's approval. When a conference is unlocked, anyone on the network can join a conference call automatically with the conference dial-in number and PIN. When the conference is locked, a contact must wait for the main presenter, the person who initiated the conference call, to admit the contact to the meeting.

To lock and unlock a conference:

1 During an active conference, tap ☰ and tap **Lock**.

The conference is locked, and anyone that tries to join the call must be admitted by the main presenter.

2 Tap ☰ and tap **Unlock** to enable people to join the conference.

The conference is unlocked, and anyone can join the conference call.

Admit or Deny Participants to a Locked Conference Call

A contact that is trying to enter a locked conference call is displayed in the roster with an alert icon ⓘ on the main presenter's phone.

To admit or deny a new participant to a locked conference call:

1 In the Participants list, tap the new participant and tap ☰.

2 Do one of the following:
  ➢ Select the new participant and tap **Admit**.
  ➢ Select the new participant and tap **Deny**.

Managing Video Calls

When the RealPresence Trio Visual+ content and video accessory is paired with the RealPresence Trio 8800, you can send video to your contacts with a connected Logitech Webcam C930e USB camera and view video from contacts on a connected monitor. See Logitech Support for more information on the Logitech Webcam C930e.

If you do not have a Logitech Webcam C930e connected to the RealPresence Trio Visual+ when you receive video during calls, you can see your contact's video, but your contact cannot see video from you.

The following topics are included in this section:

- Tips for Video Calls
- Video Call Settings
- Place a Video Call
- Video Calls without a Camera

Tips for Video Calls

Use the following tips when you're in a video call:

- Check your video image to make sure it's clear, bright, and sharp. For information on adjusting camera settings, see Change Video Clarity .
- Avoid bright lights or windows behind you. If the camera faces a window or bright lights, you may have to adjust the camera settings. To adjust camera settings, see Video Call 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.

Web Info: Video conferencing etiquette

For more tips on proper video conferencing etiquette, see Polycom's The Etiquette of Video Conferencing and Telepresence.

Video Call Settings

When you update video settings, you change the way all video calls display for a RealPresence Trio 8800. If you update settings during a call, the new settings apply to the next call and not the current call.

You can update the following video settings on the system:

- Set the Call Rate for Video Calls
- Change Video Clarity
- Change How Far-End Video Displays

Set the Call Rate for Video Calls

You can set the maximum bandwidth to use for a video call. The call rate you select applies to your next video call. Your system administrator can set a maximum call rate for video calls. If your system administrator sets a call rate limit, you cannot select a call rate above this limit.

To set the maximum call rate to use for video calls:

1   Navigate to **Settings > Basic > Call Rate**.
2   From the **Call Rate** screen, select the maximum call rate you want to use for video calls. You can choose a call rate between 128 kbps and 4096 kbps. The default setting is 2048 kbps.

Change Video Clarity

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

To change the clarity of your video:

1   Navigate to **Settings > Basic > Video > Camera Settings**.
2   From the **Camera Settings** screen, tap **Target Frame Rate**, and tap Up or Down to move the slider to change the frame rate.

Change How Far-End Video Displays

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

- *Normal*   The video image displays with correct proportions. Black bars appear on the top, bottom, or sides of the area to maintain the correct aspect ratio if the aspect ratio of the sent video does not match the display area on the system. The portions of the video that are not being received display as black bars.
- *Full*   If the received video image is not the same aspect ratio as the monitor's display area, the video image is stretched to fill the area. If the aspect ratios match, no stretching occurs.
- *Crop*   The video image is resized to maintain the correct aspect ratio. Any parts of the image that do not fit within the area are cropped.

To change the way far-end video displays:

1   Navigate to **Settings > Basic > Video > Video Screen Mode**.
2   From the **Video Screen Mode** screen, select and adjust the following settings:
3   Tap **Video Screen Mode (Full Screen)** to adjust the video image that displays on the full screen to **Normal**, **Full**, or **Crop**. The default setting is Normal.
4   Tap **Save**.

Place a Video Call

You can place a video call to one contact or show video during a conference call.

To place a video call:

1   Tap **Place A Call**, enter a number or select a contact from Contacts or Recent Calls.

2   Tap 📞 or tap **Dial**.

Place a Skype for Business Video Call

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

To place a video call:

1   Tap **Place A Call**, enter a number or select a contact from Contacts or Recent Calls.

2   Tap 📞 or tap **Dial**.

Stop Sending Video

You can stop transmitting video at any time during a call. Stopping video does not create an audio-only call.

To stop sending video during a call:

»   Tap ☰ and tap **Video Mute**.

The stop video icon 🚫📹 is displayed and the far-side cannot see you.

> **Note: How can I stop far-side video?**
> You can't start and stop far-side video. If the system is set up to receive far-side video, the far-side video always displays.

Handling Conference Calls with Video

When you set up a conference, the system displays video for only one conference participant at a time, even if more than one participant can send video. The person whose video you see is the active speaker or the last person with video enabled who joined the conference.

> **Note: Is it possible to view all video participants?**
> Viewing all video participants requires the use of a Polycom Video Conference Bridge. For more information, contact your Polycom reseller.

Video Calls without a Camera

When you do not have a Logitech Webcam C930e attached to the RealPresence Trio Visual+, you can receive video, but you cannot send video. Video always displays when the person you are talking with can send video and the system is enabled to receive video.

Audio and Video Calls

When you are in a call with a person who has a video-enabled phone or video conferencing system, the far side video displays on the monitor. For contacts without video enabled, only your video stream displays on the monitor, and an Audio icon displays on the monitor with the number of contacts on audio. For more information on viewing and changing how the far-side video displays, see the section Change How Far-End Video Displays.

Handling a Mixture of Video and Audio-Only Calls

When you have multiple calls, and two or more calls are video calls, only the active call shows a video stream of the far side. All other video calls show a paused grayscale image of the far side. If you resume a held video call, the held call becomes active and displays an active video stream again.

Showing Content

When a RealPresence Trio Visual+ is connected to a TV monitor and paired with the RealPresence Trio 8800, you can show content to in-room meeting participants and during audio or video calls. You can use the following applications to show content:

- Polycom® RealPresence® Desktop
- Polycom® RealPresence® Mobile
- Polycom® People + Content™ IP
- Microsoft® Lync® 2013
- Microsoft® Skype™ for Business 2015

Showing Content with RealPresence Desktop or Mobile

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

Show Content using RealPresence Desktop

On your laptop, you can choose to share your monitor or share an open application.

To show content using RealPresence Desktop:

1 Open the RealPresence Desktop application.
2 In the application, click ⊙ and select **SmartPairing**.
3 Click the check boxes for **Enable SmartPairing** and **Auto Detection**, then select **Ok** or **Done**.

   The SmartPairing icon ☎ is displayed in the toolbar.
4 Select ☎ and select **Share Content**.
5 Select your room system's name or IP address, and select **Pair**.

   If your room system is not listed, enter your system's IP address as shown on the TV monitor and select **Pair**.
6 Choose a monitor or application to share.

   Your content displays on the room system.

See the section Content Sharing for help troubleshooting issues with showing content.

Show Content using RealPresence Mobile

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

To show content using RealPresence Mobil:

1   Open the RealPresence Mobile application.

2   In the application, select ⊙ and tap **SmartPairing**.

3   Tap the check boxes for **Enable SmartPairing** and **Auto Detection**, then tap **Done**.

The SmartPairing icon 📷 is displayed in the toolbar.

4   Tap 📷 and tap **Share Content**.

5   Select your room system's name or IP address, and tap **Pair**.

If your room system is not listed, tap **Manual Pairing**, enter the IP address as shown on the TV monitor, and tap **Go**.

6   Choose the application you want to share, then ▶.

Your content displays on the room system.

See the section Content Sharing for help troubleshooting issues with showing content.

Stop Showing Content

When you done showing content, make sure to stop sharing content from your laptop or tablet.

To stop showing content:

»   Do one of the following:

➢   Click **Stop Sharing** in RealPresence Desktop.

➢   Tap ■ in RealPresence Mobile.

➢   Tap **Stop Content** on the system.

Showing Content with People+Content IP

The People+Content IP application enables you to send content from a computer using the RealPresence Trio 8800 system's IP address.

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

●   While People + Content supports any computer desktop resolution, video streamed to the RealPresence Trio solution will be scaled to either 720p or 1080p

●   People+Content provides video-only content. No audio is shared.

Download and Install People+Content IP

Download and install the People+Content IP application onto your computer to use it to show content.

To download and install People+Content IP on a computer:

1 On your computer, go to the Polycom People+Content IP page.

2 Scroll to the **Resources** section and download the People+Content IP software for Mac or PC.

3 Open the zip file and click on the application installation.

4 Follow the installation wizard.

Show Content with People+Content IP

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

To show content with People + Content IP:

1 On your computer, navigate to the People + Content IP folder in **My Computer** on a Windows computer or **Finder** on a Mac computer, and run the **People + Content IP** application.

2 Enter the IP address of the RealPresence Trio 8800 and the meeting password, if one is set.

3 Click **Connect**, open the content you want to show, and click ▶ .

Stop Showing Content with People+Content IP

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

To stop showing content:

» Click ■ in People+Content IP application.

Show Content over USB

You can connect your computer over USB to the RealPresence Trio 8800 system and show content using the People + Content® IP application. Video and data sent from People+Content application is sent over the USB cable and no network connection is required. This is useful for environments where guest IP access is not allowed.

To show content over USB:

1 Connect a USB cable from the USB port on the RealPresence Trio 8800 to the USB port on your computer.

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

2 If the application folder does not open automatically, on your computer, navigate to the People + Content IP folder in **My Computer** on a Windows computer.

3 Open the content you want to show, and click ▶ .

Showing Content in a Skype for Business Environment

When the RealPresence Trio 8800 is registered with Skype for Business, you can show content during in-person meetings and during video or audio calls using the Skype for Business client.

Show Content in a Skype for Business Video Call

To show content during Skype for Business video calls, you need to add your Skype for Business user account to the call and show content using the Skype for Business client on your laptop.

To show content during a Skype for Business call:

1   Tap **Add** on the RealPresence Trio 8800 and enter your Skype for Business username (username@domain.com).

2   Answer the call in the Skype for Business client on your laptop.

3   In the conversation window, click 🖥 and choose how you want to show content.

Show Content in a Skype for Business Online Meeting

When you join a Skype for Business Online Meeting from the RealPresence Trio 8800, you can show content by joining the meeting from the invite on your laptop.

To show content during a Skype for Business Online Meeting:

1   On your laptop, open the meeting invite and click **Join** Skype for Business **Meeting**.

2   In the conversation window, click 🖥 and choose how you want to show content.

Show Content Out of a Skype for Business Call

When you are not in a Skype for Business call, you can show content using the Skype for Business client, or you can use the RealPresence Desktop, RealPresence Mobile, or People + Content IP applications. For instructions on showing content with other applications, see the sections Showing Content with RealPresence Desktop or Mobile or Showing Content with People+Content IP.

To show content out of a call using the Skype for Business client:

1   In the Skype for Business client, enter the name of the conference room in the Search field, right-click on the conference room, and click **Send an IM**.

2   In the message window, click 🖥 and choose how you want to show content.

Using the Calendar

When your RealPresence Trio 8800 is configured to connect to the Microsoft Exchange Server, you can view and join meetings scheduled in Microsoft® Outlook® from the RealPresence Trio 8800.

Open the Calendar

You can access the calendar on the system to view and join your scheduled meetings. You can only view meetings for the current day. You cannot view meetings for previous or upcoming days.

To open the calendar:

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

The calendar displays your meetings for the day, as shown next.
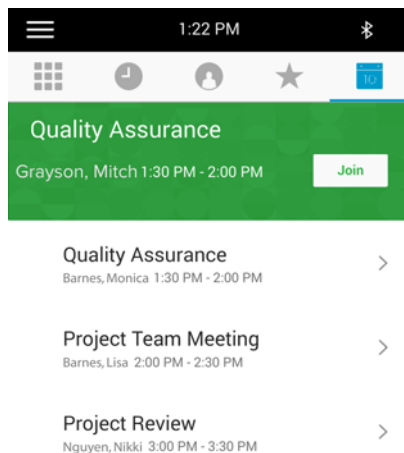
> **Troubleshooting: Why doesn't the calendar display?**
>
> If you select Calendar, and the Calendar does not display, it is possible your login credentials are incorrect or the Calendar is not connected. See the section Troubleshoot the Calendar for more information.

Display Meeting Details

From the Meeting Details screen, you can view the meeting's start and end time, location, organizer, invitees, and meeting description, as shown next. You can also join meetings and view all meeting numbers that you can use to join the meeting.

Meeting Details
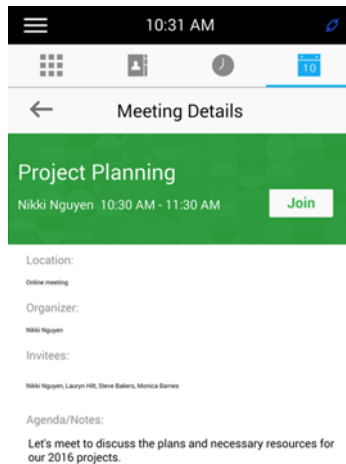
To display Meeting view:

» From **Day** view, select a meeting.

Return to Day View

Day view is the default Calendar view, and you can return to Day view from Meeting view.

To return to Day view:

» Tap ←.

Meeting Reminders

By default, the system displays a meeting reminder 5 minutes before a meeting starts. Every minute before the meeting starts, the system emits an alert tone and displays the meeting reminder. From the reminder, you can join a meeting and view meeting details. The following figure shows a meeting reminder.

Meeting Reminder
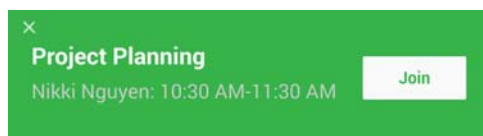
Joining Meeting

You can join a meeting from the Calendar or from a meeting reminder.

Join Meetings from the Calendar

You can join meetings from the Calendar in Day view or from the Meeting Details screen.

To join a meeting from the Calendar:

 » Do one of the following:

 ➢ From **Day** view, tap **Join** for your meeting.

 ➢ Tap a meeting and tap **Join** in the Meeting Details screen.

Join a Meeting from a Meeting Reminder

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

To join a meeting from a meeting reminder:

 » Tap **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 choose to view and use alternate numbers to join the meeting.

To join a meeting using an alternate meeting number:

 » In the **Meeting Details** screen, choose a number.

Join Skype for Business Meetings from the Calendar

You can join Skype for Business meetings from the Calendar either from meeting reminders or the Meeting Details screen.

To join a Skype for Business meeting from Meeting view:

 1 From **Day** view, select the meeting.

 2 In the **Meeting Details** screen, tap **Join**.

Choose a Meeting Reminder Type

You can choose to have the following types of meeting reminders on the RealPresence Trio 8800:

 ● *Silent*   The meeting reminder is displayed and no alert tone plays.

 ● *Audible Once*   An alert tone plays the first time a meeting reminder is displayed, but does not play for additional reminders for the meeting.

● *Audible Always*   An alert tone plays each time a meeting reminder is displayed.

To choose the type of meeting reminder:

1 Navigate to **Setting > Basic > Preferences > Calendar Settings > Reminder Settings**.
2 From the **Reminder Settings** screen, select **Reminder Type**, and choose a type.

Troubleshooting: Why don't my meeting reminders display?
If you have enabled meeting reminders, but the system is not displaying them, make sure that your login credentials are correct.

Choose an Alert Tone

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

To choose an alert tone:

1 Navigate to **Setting > Basic > Preferences > Calendar Settings**.
2 From the **Calendar Settings** screen, select **Alert Tone**.
3 Choose an alert tone and tap **Play** to hear the tone.

Disable Meeting Reminders

Meeting reminders are enabled on the system by default. When enabled, reminders display for all meetings. When disabled, reminders do not display for any meetings. You can choose to disable meeting reminders so they do not display for any meetings.

To disable meeting reminders:

1 Navigate to **Setting > Basic > Preferences > Calendar Settings > Reminder Settings**.
2 From the **Reminder Settings** screen, select **Reminder > Disable**.

Managing Call Lists and Directories

RealPresence Trio 8800 supports a Recent Calls list, a Local Directory, and a Corporate Directory. The system can also support a Skype for Business Directory and a BroadSoft Directory, depending on your server and if enabled by your system administrator. This section describes each of these in the following topics:

- View Recent Calls
- Managing the Local Directory
- Using the Corporate Directory
- Managing Skype for Business Contacts
- Searching the BroadSoft Directory

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

View Recent Calls

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

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

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

The following icons display next to a call to indicate the call type:

- Indicates a placed audio call
- Indicates a placed video call
- Indicates a received audio call
- Indicates a received video call
- Indicates a missed call
- Indicates a missed video call

To view your Recent Calls list:

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

View Call Details

In the Recent Calls list, you can view call details, edit call details before calling a contact, save a contact to your directory, and delete call entries.

To view call details:

» Tap (i) next to a call record.

Save a Recent Contact

From the Call Details screen, you can save a contact to the Local Directory.

To save a contact to your Local Directory:

1 From the **Call Details** screen, tap **Save**.
2 If needed, edit the contact's information.
3 Tap **Save**.

Delete a Recent Call Entry

You can delete a recent call entry from the Recent Calls list.

To delete a recent call entry from the Recent Calls list:

» Select a call record and tap ❎ .

Edit Recent Contact Entries

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

To edit a recent contact's number before calling the contact:

1 Tap (i) next to a call record.
2 Tap ✏ .
3 Edit the number then tap 📞 .

View Recent Skype for Business Calls

When the RealPresence Trio 8800 is registered with the Skype for Business Server, you can view a list of placed, received, and missed Skype for Business calls on the system in the Recent Calls list, in the Skype for Business client in the Conversations tab, or in Microsoft® Outlook® in the Conversation History folder.

The last 99 Skype for Business calls display in the Recent Calls list on the system. If you delete or move call entries on the system, if enabled, the changes are made on the system only. If you delete call entries in the Skype for Business client, the changes are made on the system and in the Skype for Business client.

To view your recent calls list in the Skype for Business client:

» Click 🗩.

View Recent Skype for Business Calls in Outlook

Missed Skype for Business calls display in your Inbox folder in Outlook.

To view your Skype for Business recent calls list in Outlook:

» In Outlook, click **Conversation History**.

> **Troubleshooting: My Skype for Business conversations do not display in my Outlook Conversation History**
>
> If you do not see your most recent Skype for Business conversations listed in the Conversation History menu of your Outlook client, in your Skype for Business client, navigate to **Options> Tools > Options > Personal**, and check **Save call logs in my emails Conversation History folder**.

Managing the Local Directory

You can store a large number of contacts in the system's Local Directory. Contact your administrator for the exact number of contacts supported.

You can perform the following tasks in your Local Directory:

● Search for Contacts
● Add a Contact to the Local Directory
● View Contact Details
● Update a Contact's Information
● Delete a Contact
● Add Favorites

Search for Contacts

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

To search for a contact:

1 Navigate to **Contacts > Local Directory**.
2 In the **Local Directory**, enter your search criteria in the Search field.

A list of search results is displayed.

Add a Contact to the Local Directory

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

The following is a list of information you can enter for each contact:

● *First and Last Name*   The name of your contact.

● *Contact*   Your contact's number.

● *Job Title*   Your contact's position.

● *Email*   A personal or work email address.

> **Note: Directory Fields are Administrator-Set**
> If the system does not display all the above mentioned contact fields, see your system administrator. The only required field in the Local Directory is the Contact field, which includes the contact's number.

To add a contact to your Local Directory:

1   In the **Local Directory**, tap ╋.

2   From the **Add Contact** screen, enter your contact's information in the available fields.

3   Select **Save**.

View Contact Details

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

To view contact details:

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

2   In your **Local Directory**, select a contact.

The **Details** screen is displayed with the contact's name and number. Additional information, such as a job title or email address, can also display.

Update a Contact's Information

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

To update a contact's information:

1   From the **Local Directory**, select a contact.

2   From the **Details** screen, tap ✎ .

3   From the **Edit Contact** screen, update the contact's information.

4   Select **Save**.

Delete a Contact

You can delete any contact from the Local Directory.

To delete a contact:

1   From your **Local Directory**, select a contact.

2   From the **Details** screen, tap **Delete Contact**.

A confirmation message is displayed, confirming that you want to delete the contact.

3   Tap **Yes** to delete the contact.

Add Favorites

Favorites are the contacts in your Local Directory that you will call most often. Contacts that you add as favorites display on the Home screen. Only three favorites display onscreen at a time, and 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.

The following figure shows favorites at the bottom of the Home screen next to the line.

Favorites on the Home screen
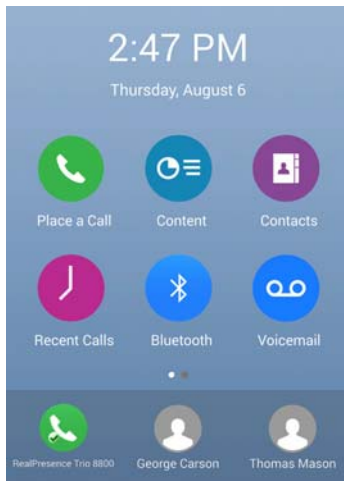
To add a contact as a Favorite:

1   Navigate to **Contacts > Local Directory** and select a contact.

2   On the **Details** screen, tap ☆.

The Favorites icon ★ is changed to blue, and the contact is added to the Home screen.

Remove Favorites

You can remove favorites to make room for new favorites.

To remove a favorite:

1   Navigate to **Contacts > Local Directory** and select a contact.

2   From the **Details** screen, tap ★.

The Favorites icon ☆ is changed to white, and the contact is removed from the Home screen.

Using the Corporate Directory

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

You can do the following in the Corporate Directory:

- Search for contacts.
- Dial contacts.
- Add contacts to your Local Directory.

Searching the Corporate Directory

In the Corporate Directory, you can perform a quick or advanced search of contacts.

Perform a Quick Search

A quick search enables you to search for contacts using either their first name, last name, or by typing a few letters in their name.

To perform a quick search of the Corporate Directory:

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

2 In the Search field, enter your contact's first or last name and tap **Submit**.

   The screen displays a list of contacts, starting with the most successful matches.

3 Select a contact and tap **View** to see your contact's information.

   The Contact screen is displayed.

Perform an Advanced Search

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

To perform an advanced search:

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

   By default, a blank search screen is displayed.

2 In the **Corporate Directory**, select **AdvFind**.

3 From the Advanced Find screen, enter your search criteria, and select **Submit**.

   The screen displays a list of contacts, starting with the most successful matches.

4 Select a contact and tap **View** to see your contact's information.

   The Contact screen is displayed.

Add Corporate Directory Contacts to the Local Directory

You can add contacts in the Corporate Directory to your Local Directory. When you choose to save a Corporate Directory contact to the Local Directory, the first name, last name, and number of the contact are

automatically saved, and you can choose to add additional information before saving the contact. See the section Managing the Local Directory for information on viewing and editing contacts.

To add a contact to your Local Directory:

1 In the **Corporate Directory**, search for a contact.

2 From the search results, select the contact, and select **View**.

3 From the Contact screen, select **Save**.

4 Enter any additional contact information and tap **Save**.

Managing Skype for Business Contacts

When you are signed into your Skype for Business account on the RealPresence Trio 8800, all Skype for Business contacts and groups created in your Skype for Business client display in the Contacts list on the system. You can view your Skype for Business contacts, search for contacts, add additional contacts, call contacts, and view presence information for all Skype for Business contacts on the system.

View Skype for Business Contacts

You can view a list of your Skype for Business contacts added in your Lync client in the Contacts list on the RealPresence Trio 8800. A maximum of 200 Skype for Business contacts display.

To view a list of Lync contacts:

» Navigate to **Contacts > Contacts**.

Up to 200 of your Skype for Business contacts display alphabetically on the Contacts screen.

View Skype for Business Contacts' Information

You can view contact information for Skype for Business contacts on the RealPresence Trio 8800 and make calls directly to any of the available numbers, including voicemail. You can view the following detailed information for Skype for Business contacts, depending on your privacy relationship with the contact:

● Name
● Presence Status
● Organization
● Email address
● Work number
● Mobile number
● Home number
● Voicemail

To view contact information for Skype for Business contacts:

1 From the Home screen, tap **Contacts > Contacts**.

2 From the Contact List, select a contact, tap ≡ then tap **Info**.

Your contact's presence status and contact information displays, as shown next.
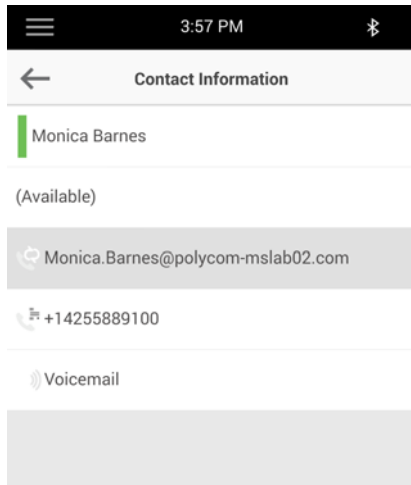
Change the Privacy Relationship for a Contact

In order for a contact to view your detailed information, you must change your privacy relationship with that contact to Friends and Family in the Skype for Business client. If you do not change the privacy relationship to Friends and Family, that contact can view the work number, email address, and voicemail only.

To change the privacy relationship for a contact:

1 In the Skype for Business client, select a contact, right-click, and select **Change Privacy Relationship.**

2 Click **Friends and Family**.

Your contact can now view all of your available contact information.

Skype for Business Contact Presence Information

You can view a contact's presence information on the Home screen or in the Contacts list. Presence information includes your contact's availability and an activity description. The following table shows the presence icons and descriptions that display for Skype for Business contacts.

Presence Icons

Icons	Description
	Available
	Busy, In a Call, In a Meeting, In a Conference Call
	Away, Be Right Back, Inactive, Off Work

Presence Icons

▮▮	Do Not Disturb, Presenting, In Presentation
▮	Offline
▯	Unknown
▮	Blocked

Note: Out of Office setting in Outlook displayed on presence icons

An asterisk on a presence icon indicates that a contact has set Outlook to Out of Office. For example, if a contact's presence is displayed as Available with an asterisk, that contact is signed into the Skype for Business client as available but has set Outlook to Out of Office.

View Skype for Business Contact Groups

You can view groups created in your Skype for Business client on the RealPresence Trio 8800. However, you cannot create new groups, delete existing groups, or move contacts between groups on the system.

To view your Skype for Business groups on the system:

» From the Home screen, tap **Contacts > Contacts > Groups**.

All your Skype for Business contact groups display.

Search for Skype for Business Contacts

The Microsoft Skype for Business Address Book Service (ABS) enables you to search for Skype for Business and Microsoft Outlook contacts in the Skype for Business global directory, view a contact's information and presence status, call contacts from the directory search results, and save contacts to your Contacts list.

To search for Skype for Business contacts:

1 Navigate to **Contacts > Contacts** then tap **Search**.
2 In the Search field, enter your contact's name.

Results matching your search display automatically.

Add Lync Contacts to the Contact List

You can search for Skype for Business contacts on the system and add those contacts to the Contacts list. When you add a contact, you can view contact and presence information for that contact on the system.

To add a Skype for Business contact to the Contact list:

   1   Navigate to **Contacts > Contacts** and tap **Search**.

   2   In the search field, enter your contact's first or last name.

       Results matching your search display automatically.

   3   Select your contact and tap **Add to Contacts**.

       The contact is added to the Contact list on the system.

Add a Contact Outside Your Organization

You can also add contacts that are not in your organization to your Skype for Business client and have those contacts display on the system.

To add a contact not in your organization your contact list:

   1   In the Skype for Business client, click .

   2   Click **Add a Contact Not in My Organization** and choose to add the contact from Skype for Business, Skype, or another application.

   3   Enter the information for your contact and click **OK**.

       The contact is added to the Contact list on the system.

Viewing Skype for Business Favorites

You can view the Skype for Business contacts saved as favorites in the Skype for Business client on the Home screen of the RealPresence Trio 8800, as shown next. Only contacts you add as favorites in the Skype for Business client display as favorites on the system. You cannot add Skype for Business contacts as favorites on the system.

Skype for Business favorites on the Home screen
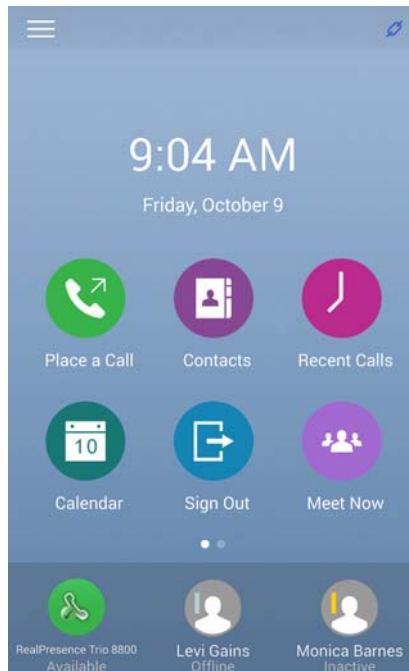
Update Your Skype for Business Presence

You can change your Skype for Business presence status and presence information on the RealPresence Trio 8800. When you change you presence status on the system, the information is automatically updated in the Skype for Business client.

To change your presence status on the system:

1 Navigate to **Settings > Features > Presence > My Status**.

2 Choose your desired presence status, as shown next.
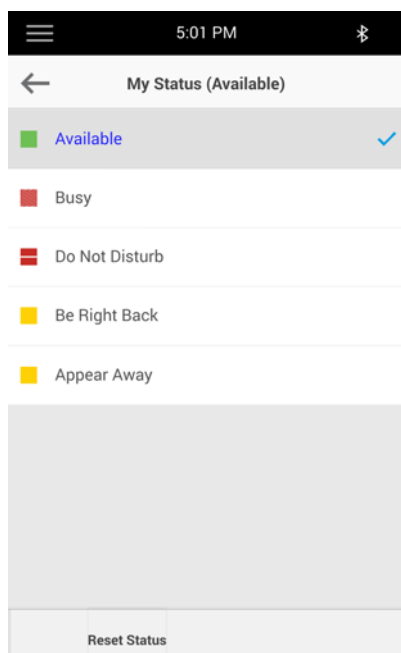
You can change your status to Available from any other status by pressing **Reset Status**.

For information on viewing your contacts' presence status, see the sectionSkype for Business Contact Presence Information.

Searching the BroadSoft Directory

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

Perform a Simple Search

A simple search enables you to search for contacts using either their first name, last name, or by typing a few letters in their name.

To perform a simple search:

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

     A search screen is displayed.

 2   Enter your search criteria, and select **Submit**.

     Your search results display. The number of records that match your search criteria is displayed for one second above the soft keys. A maximum of 50 contacts are available for viewing at one time.

> **Troubleshooting: Errors when accessing the BroadSoft Directory**
> If the BroadSoft Directory cannot be reached, the message "Server Unavailable" is displayed. Contact your system administrator.

Perform an Advanced Search

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

To perform an advanced search:

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

 A search screen is displayed.

2 Select **Advanced Search** in the BroadSoft Directory.

 The Advanced Search screen is displayed.

3 In the **Advance Search** screen, choose to search for a contact by first name, last name, or a contact number.

4 Enter your search criteria, and select **Submit**.

 Your search results display.

5 Choose your contact.

 The Details screen is displayed.

Add BroadSoft Contacts to the Local Directory

After you find your BroadSoft contact, you can add the contact to your Local Directory on the system. The first name, last name, and number of the contact are saved to the Local Directory. You can go to the Local Directory to see if the contact was saved correctly and to add additional contact information. See the section Managing the Local Directory for information on viewing and editing contacts.

To add a BroadSoft contact to the Local Directory

» In the Details screen, tap **Add to local directory**.

Accessing Voicemail and Receiving Broadcast Messages

You can send, broadcast, and access a variety of audio, verbal, video, and written messages on RealPresence Trio 8800s. This section includes the following topics:

● Access Voicemail Messages
● Access Skype for Business Voicemail Messages
● Receiving Messages with Group Paging

> **Note: Feature availability**
> The system 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

You are notified of new voicemail messages on the RealPresence Trio 8800 in the following ways:

● The number of voicemails displays on the Voicemail option in the menu.
● An audible alert is played.

> **Note: Set or change your voicemail greeting**
> Contact your system administrator or service provider for information on setting or changing the voicemail greeting.

To access voicemail messages:

1 From the **Home** screen, navigate to **Settings > Features > Voicemail > Message Center**.
2 If you have multiple lines on the system, select the line that has the new message.
3 From the **Messages** screen, tap **Connect** and follow the prompts to access your messages.

> **Note: Accessing voicemail remotely**
> Contact your system administrator or service provider for information on remotely accessing your voicemail.

Access Skype for Business Voicemail Messages

When the system is registered with the Skype for Business server, you can view individual voicemail messages on the system. For each voicemail message, you can view the contact who left the message, the contact's presence status, and the status of the voicemail message. You can also call contacts from the Voicemail screen.

The following icons display next to each message to indicate the status of a message:

- Unread message
- Read messages

To access your Skype for Business voicemail messages:

1 Tap **Messages** or navigate to **Settings > Features > Voicemail**.

A list of voicemail messages is displayed, as shown next.

2 Select a message and tap **Play**.

Managing Skype for Business Voicemail Messages

From the Skype for Business Voicemail screen, you can call a contact, delete messages, or mark unread messages.

Call a Contact

After you listen to a contact's voicemail, you can call the contact from the Voicemail screen.

To call a contact from the Skype for Business Voicemail screen:

» Select a message and tap **Call**.

Delete Voicemail Messages

After you listen to a message, you can delete the message from the system.

To delete a voicemail message:

» Select a message and tap **Delete**.

Mark Message as Read

You can choose to mark unread messages that you do want to listen to as read. Marking a message as read removes the message alert.

To mark a message as read:

» Select a message and tap **Mark As Read**.

Receiving Messages with Group Paging

Group Paging enables you to receive pages—one-way audio announcements—from contacts subscribed to a page group. Your administrator can enable the system to operate in a broadcast mode called Group Paging mode. In this mode, you can receive one-way announcements from a specified group called a Paging Group.

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

Each group has one of the following priorities:

- *Normal* By default, broadcasts sent to groups 1 to 23 are considered Normal broadcasts. If two users begin a broadcast on the same group at the same time, the system with the lower serial number continues to transmit while the other system enters the receiving state. By default, all systems are configured to receive broadcasts sent to group 1.

- *Priority* By default, broadcasts sent to group 24 are considered Priority broadcasts. A Priority broadcast interrupts Normal broadcasts or active calls. All systems receive Priority broadcasts unless Do Not Disturb is enabled. Priority broadcasts are played at the system current audio level.

- *Emergency* By default, broadcasts sent to group 25 are considered Emergency broadcasts. An Emergency broadcast interrupts Normal broadcasts, Priority broadcasts, and active calls and plays out at near maximum volume even if Do Not Disturb is enabled.

Receiving Pages

To receive pages, you need to subscribe to certain paging groups. By default, you are subscribed to paging groups 1, 24, and 25. This means that you can receive pages to paging groups 1, 24, and 25. Contact your system administrator to find out which paging group you are subscribed to.

How you receive a page depends on the priority of the page, whether you are in an active call, and whether the system is set to receive a page during an active call. When you receive a page, the page is always played through the system's speakerphone. You cannot play a page through your handset or headset.

You receive pages on the paging groups you are subscribed to as well as Group 24, Priority pages, and Group 25, Emergency pages. When you enable Do Not Disturb, you only receive Emergency pages. Non-emergency pages do not display or play.

Receiving Pages When You're Not in an Active Call

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

While a page plays, you can:

- Hold the page.
- End the page. This ends the page on the system only.
- Place a new call.

Listen to Pages during Active Calls

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

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

- When the system is set up to receive Normal pages during active calls, the page immediately plays, and you hear both the original call and the page.

- When the system is not set up to receive Normal pages during active calls, the page is displayed as a Pending page.

- When the page is a Priority or Emergency page, the page immediately plays. You hear the original call and the page.

To listen to a page during a call:

» Do one of the following,

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

➢ For Pending pages, select **Accept** or hold the call.

When you adjust the volume of a non-emergency page, the system uses the adjusted volume for subsequent non-emergency pages. However, only your system administrator can change the volume of an Emergency page.

Connecting Devices to the RealPresence Trio 8800

You can connect a laptop or mobile devices to the RealPresence Trio 8800 using a USB cable, Bluetooth, or Near Field Communication (NFC). When you connect a device to the system, you can play audio from audio calls, video calls, music players, or videos on the system. See the following section for information on connecting a device to the RealPresence Trio 8800:

● Make the RealPresence Trio 8800 Visible to Nearby Bluetooth Devices

● Connect a Bluetooth Device

● Connect a Bluetooth Device Using Near Field Communication

● Play Audio from a Bluetooth Device

● Connecting a Device using a USB Cable

● Connecting a Laptop to RealPresence Trio 8800

● Setting RealPresence Trio 8800 as Your Audio Device

Make the RealPresence Trio 8800 Visible to Nearby Bluetooth Devices

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

To make the system visible to nearby devices:

1 On the Home screen, tap **Bluetooth**.

2 Make sure the statement **Visible to all nearby Bluetooth device** is displayed below the system's name, as shown next.
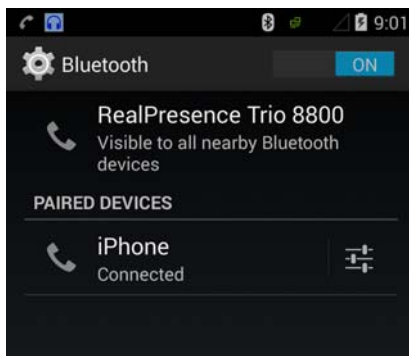
3 If the statement **Only visible to paired devices** is displayed, tap the system's name.

The system is now visible to all nearby Bluetooth devices.

Connect a Bluetooth Device

You can connect a Bluetooth-capable mobile phone or tablet to the RealPresence Trio 8800, if your system administrator has enabled Bluetooth on the system. The RealPresence Trio 8800 can remember up to 10 previously paired devices.

The Bluetooth feature on the RealPresence Trio 8800 enables you to place calls on your mobile phone and use the system as a speakerphone for the call (see the section Place a Call over Bluetooth). You can also use the system to play audio from media, such as music or videos, from your mobile phone or tablet (see the section Play Audio from a Bluetooth Device).

This feature is disabled by default. Check with your administrator before attempting to connect a Bluetooth device to the RealPresence Trio 8800.

To connect a Bluetooth-capable phone or tablet to the system:

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

> **Note: Connecting Bluetooth devices during calls**
>
> You cannot connect a Bluetooth device to the system when you are in a call on the system.

Connect a Bluetooth Device Using Near Field Communication

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

To connect a Bluetooth-capable phone or tablet using NFC:

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 system.

3 Confirm that your device is paired and connected to the system.

Play Audio from a Bluetooth Device

You can use the RealPresence Trio 8800 as a Bluetooth speaker for audio from music or videos played on your mobile phone or tablet.

To use the RealPresence Trio 8800 as a Bluetooth speaker for media:

1 Connect your mobile phone or tablet with the RealPresence Trio 8800.

2 On your mobile phone or tablet, choose the music or video you want to hear.

3 Make sure that the system is set as your audio device.

The audio plays through the system's speakers.

Connecting a Device using a USB Cable

You connect your mobile phone or tablet directly to the system using a USB cable or a micro USB cable. When you connect your device to the system, you can use it as a speaker for audio calls or media played on your device. See the section RealPresence Trio 8800 Hardware for the location of the USB ports on the system.

Connecting a Laptop to RealPresence Trio 8800

Before you connect your laptop to the RealPresence Trio 8800, make sure your laptop meets the minimum hardware and software requirements shown in the following table.

Minimum Hardware and Software Requirements for the Connected Laptop

Category	Requirement
• Operating System	Windows 8.1 (32-bit or 64-bit) Windows 8 (32-bit or 64-bit) Windows 7 (32-bit or 64-bit)
• Desktop client or application	Polycom RealPresence Desktop Microsoft Skype for Business
• USB connector	A USB 3.0 port is required for 1080p calling. Connecting the system to a USB 2.0 or USB 1.0 port can result in reduced performance.

Connect Your Laptop

You connect a laptop to the RealPresence Trio 8800 using a USB cable. When connected, you can use the system to play audio from video calls, including Skype for Business calls, and from media including music and videos. See the section RealPresence Trio 8800 Hardware for the location of the USB port.

To connect your laptop to the system:

» Connect a USB cable from your computer to the USB port on the system.

Setting RealPresence Trio 8800 as Your Audio Device

In order to use the RealPresence Trio 8800 system to play audio from calls or media on your connected laptop, you need to set the system as your audio device. The following sections provide information on setting the system as your audio device in RealPresence Desktop, the Skype for Business client, and for your laptop.

Set RealPresence Trio 8800 as Your Audio Device in RealPresence Desktop

When your laptop is connected to the RealPresence Trio 8800, you can set the system as your audio device input and output device in the RealPresence Desktop application to play audio from the meeting using the system speakers and use the system as your microphone.

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

To set the system as your audio device:

   1 In RealPresence Desktop, click 		 and click **Audio Device**.

   2   For **Audio input device (microphone)**, click **RealPresence Trio 8800** from the drop-down list.

   3   For **Audio output device (speakers)**, click **RealPresence Trio 8800** from the drop-down list.

   4   Click **OK**.

Set RealPresence Trio 8800 as Your Audio Device for Skype for Business

When your laptop is connected to the RealPresence Trio 8800, you can set the system as your microphone and speakers for Skype for Business calls you place on your laptop.

To set the system as your audio device for Skype for Business:

   1 In the Skype for Business client, click 		 and click **Tools > Audio Device Settings**.

   2   Select **RealPresence Trio 8800** from the drop-down list as the device you want to use for audio calls.

Set RealPresence Trio 8800 as Your Audio Device for Your Laptop

When your laptop is connected to the RealPresence Trio 8800, you can set the system as the default audio device for your laptop and play audio from music and videos using the system's speakers.

To set the system as the audio device for your laptop:

   1   On your laptop, click **Start > Control Panel**.

   2   In the **Control Panel**, click **Hardware and Sound > Sound**.

   3   Click **RealPresence Trio 8800**, and click **Set Default**.

   4   Click **OK**.

   Any audio from music or videos plays on the system.

Customizing RealPresence Trio 8800

This section explains how to customize the system's touchscreen display. Basic customizations include changing the time and date format, setting language, and updating the screen brightness.

This section includes the following topics:

- Set the Language
- Set the Time and Date Display
- Setting the Backlight Intensity and Timeout
- Using Power-Saving Mode
- Set a Ringtone for Incoming Calls

Password Required to Customize RealPresence Trio 8800

Many of the features on the system can be enabled or customized from the Basic settings menu. If your system administrator has set up the system to require a password to access the Basic settings menu, you cannot customize the system without the permission of your system administrator. Contact your system administrator for assistance enabling or customizing the system's features.

Set the Language

The system supports several languages that you can choose to display. Check with your system administrator to find out which languages are supported.

To change the language:

1 Navigate to **Settings > Basic > Preferences > Language**.

2 From the **Language** screen, select a language.

The language on the system updates automatically.

Set the Time and Date Display

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

The following figure shows the default format for the time and date.

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

To update the time and date display:

  1 Navigate to **Settings > Basic > Preferences > Time & Date**.

  2 From the **Time & Date** screen, do one of the following:

   ➢ Select **Clock Date** to change the date format.

   ➢ Select **Clock Time** to change the time format.

   ➢ Select **Clock Order** to change the order of the time and date display.

  3 From the **Clock Date**, **Clock Time**, or **Clock Order** screen, select the format you want.

Disable the Time and Date Display

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

To disable the time and date display:

  1 Navigate to **Settings > Basic > Preferences > Time & Date**.

  2 From the **Time & Date** screen, select **Disable** to turn off the time and date display.

Setting the Backlight Intensity and Timeout

The system's backlight has the following components:

   ● *Backlight Intensity*   The brightness of the screen during system activity and inactivity.

   ● *Backlight Timeout*   The number of seconds the system is inactive before the backlight dims to its Backlight Idle intensity. The backlight timeout period begins after your last key press or the last system event, such as an incoming call.

Backlight Intensity includes the following settings you can choose from:

   ● *Backlight On*   The brightness of the screen when there is system activity.

   ● *Backlight Idle*   The brightness of the screen when there is no system activity.

   ● *Maximum Intensity*   The brightness scale that applies to both Backlight On and Backlight Idle intensities.

Change the Backlight Intensity

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

To change the backlight intensity:

1   Navigate to **Settings > Basic > Backlight Intensity**.

2   From the **Backlight Intensity** screen, select **Backlight On Intensity**.

3   From the **Backlight On Intensity** screen, select the intensity you want, and select **Back**. The default is High.

4   From the **Backlight Intensity** screen, select **Backlight Idle Intensity**.

5   From the **Backlight Idle Intensity** screen, select the intensity you want, and select **Back**. The default is Low.

6   From the **Backlight Intensity** screen, select **Maximum Intensity**.

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

Change the Backlight Timeout

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

To change the Backlight Timeout:

1   Navigate to **Settings > Basic > Backlight Timeout**.

From the **Backlight Timeout** screen, select the number of seconds the system is idle before the backlight dims. The default is 40 seconds.

Using Power-Saving Mode

By default, the system is set up with a power-saving mode that turns off the screen to conserve energy. The system enters power-saving mode after it has been idle for a certain period of time. You can configure the period of time that the system is idle before the screen turns off. You can configure different idle timeouts for office hours and off hours, such as evenings and weekends.

During off hours, the message "Off Hours Mode" scrolls on the status bar. The system exits power-saving mode if a system event occurs—for example, if the system has an incoming call or message, or you press a key or tap the screen. If a screen saver is enabled, power-saving mode still occurs.

You can update the following power-saving settings:

●   *Office Hours*   When you start work and how long you're in the office each day (see Change Your Office Hours).

●   *Timeouts*   The period of time the system should be idle before the screen turns off (see Change Timeouts).

Change Your Office Hours

When you update your office hours, you specify when you start, and how long you work each day. The system is idle in during the hours outside of your office hours.

To change your office hours:

1 Navigate to **Settings > Basic > Power Saving > Office Hours > Start Hour**.

2 From the **Start Hour** screen, select a day of the week.

3 Enter a start time using the 24-hour clock. You can enter a start time from 0 to 23.

4 Select **Save**.

5 From the **Office Hours** screen, select **Duration**.

6 From the **Duration** screen, select a day of the week.

7 Enter a duration of 0 to 12 hours per day.

8 Select **Save**.

Change Timeouts

You can update the period of time the system is idle before the screen turns off. You can specify different timeouts for office hours (Office Hours Idle Timeout) and non-office hours (Off Hours Idle Timeout). By default, the Office Hours Idle Timeout is much longer than the Off Hours Idle Timeout.

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

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

To change timeouts:

1 Navigate to **Settings > Basic > Power Saving > Timeouts**.

2 Select **Office Hours Idle Timeout**, and enter the number of minutes the system should wait, during office hours, before starting power-saving mode. Enter a number between 1 minute and 600 minutes. The default is 10 minutes.

3 Select **Off Hours Idle Timeout**, and enter the number of minutes the system should wait, during off-hours, before starting power-saving mode. Enter a number between 1 minute and 10 minutes. The default is 1 minute.

4 Select **User Input Idle Timeout**, and enter the number of minutes the system should wait after a key press or screen select before starting power-saving mode. Enter a number between 1 minute and 10 minutes. The default is 10 minutes.

5 Select **Save**.

Set a Ringtone for Incoming Calls

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

To select an incoming call ringtone for the system or a line:

1   Navigate to **Settings > Basic > Ring Type**.

2   When multiple lines are configured on the system, select a line.

3   From the **Ring Type** screen, select **Normal Ring Type** for all incoming calls or **Private Ring Type** for private calls.

4   Select a ringtone and tap **Play** to hear the ringtone.

5   Tap ← after you select your ringtone.

Using Accessibility Features

This section provides information for the following accessibility features available on the RealPresence Trio 8800:

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

Features for Hearing-Impaired Users

The following table lists the accessibility features on the RealPresence Trio 8800 for hearing-impaired users.

Accessibility Features on RealPresence Trio 8800 for Hearing-Impaired Users

Accessibility Feature	Description
Visual message indicators	Icons on the user screen indicate when the system has new messages.
Adjustable ring tone and volume	You can choose from a variety of ring tones for the system (see Set a Ringtone for Incoming Calls).
Adjustable call volume	If you're in a call, you can raise or lower the volume of the voice on the far end and of other system sounds you hear (see Change the Volume).
Visual notifications	Indicators on the screen (such as flashing bars or icons) let you know when calls are incoming, outgoing, active, or held. Indicators can also indicate system status and if certain features are activated (see Icons and Status Indicators).
TTY support	Supports commercial TTY devices such as Ultratec Superprint. In addition, the system provides acoustic coupled TTY support.

Features for Vision-Impaired and Blind Users

The following table lists the accessibility features on the RealPresence Trio 8800 for visually-impaired and blind users.

Accessibility Features on RealPresence Trio 8800 for Vision-Impaired and Blind Users

Accessibility Feature	Description
Adjustable backlight settings	You can change the brightness of the screen by adjusting backlight intensity settings (see Setting the Backlight Intensity and Timeout).
Plastic overlay	A plastic overlay is available for placement on the touchscreen for the volume keys to assist visually impaired users with adjusting the volume.
Auto-answer feature	The system can auto-answer calls, so you don't have to select an option to answer a call (see Answer Calls Automatically).

Features for Mobility-Impaired Users

The following table lists the accessibility features on the RealPresence Trio 8800 for mobility-impaired users.

Accessibility Features on RealPresence Trio 8800 for Mobility-Impaired Users

Accessibility Feature	Description
Auto-answer feature	You can set the system to auto-answer calls, so you don't have to select an option to answer a call (see Answer Calls Automatically).
Touchscreen	The system has a large touchscreen that you can select, swipe, and press to perform system functions and activate features.
Built-in speakerphone	A built-in speakerphone allows you to use the system without having to use a handset or headset.

Performing Maintenance Tasks

When the system is unable to operate properly, you need to investigate or troubleshoot issues among other tasks your administrator may ask you to perform. This section shows you how to perform the following tasks:

- Investigate Warnings
- Restart the System
- Update the System Configuration
- Test System Hardware
- Clean the Touchscreen

Investigate Warnings

When the system is unable to perform certain tasks, a notification message is displayed in the status bar and on the Settings icon on the Home screen. The warning notification lets you know that the system has one or more important issues. You can view details about the issues from the Warnings screen.

To view a detailed list of system issues:

» Navigate to **Settings > Status > Diagnostics > Warnings**.

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

Restart the System

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

> **Caution: Restarting the RealPresence Trio 8800**
> Before you restart the system, contact your system administrator. If the system is malfunctioning, you may be able to restore normal operation without restarting. In addition, your administrator may want to troubleshoot the system before you restart it.
> If you need to update the system's configuration, don't restart it. Instead, see the section Update the System Configuration.

To restart the system:

1 Navigate to **Settings > Basic > Restart Phone**.

A confirmation message is displayed.

2 Select **Yes**.

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

Update the System Configuration

Your system administrator may ask you to update the system configuration, which you can do without restarting the system.

To update the system's configuration:

1 Navigate to **Settings > Basic > Update Configuration**.

A confirmation message is displayed.

2 Select **Yes**.

The configuration is updated. The system may restart, depending on the system settings that have changed.

Test System Hardware

Your system administrator may ask you to access a diagnostics menu on the system to test its hardware. You can test the system's microphones, speaker, handset, third-party headset (if present), keypad mappings, touchscreen, and LEDs. See your system administrator for instructions on how to perform these tests.

To test the system hardware:

1 Navigate to **Settings > Status > Diagnostics > Test Hardware**.

2 From the **Test Hardware** screen, select one of the following:

➢ **Audio Diagnostics**

➢ **Display Diagnostics**

➢ **Touch Screen Diagnostics**

Clean the Touchscreen

The touchscreen on the systems requires minor maintenance, but you may periodically need to clean the touchscreen. Use a clean, dry, microfiber cloth—the kind you would use to clean glass surfaces—to wipe the touchscreen.

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

To clean the touchscreen:

1 Navigate to **Settings > Basic > Screen Clean**.

2 Wipe the screen with a clean, dry, microfiber cloth.

3 Tap the screen to enable the touchscreen again.

Note: What happens if I clean the touchscreen, but it's still dirty?

Dampen a soft, lint-free cloth with an isopropyl alcohol and water solution of 50:50, and then wipe the screen with the cloth. Always use the dampened cloth to apply the solution; never apply the solution directly, which could seep inside the screen or stain the system. In addition, do not use chemicals to clean the touchscreen.

Troubleshooting

This section lists potential issues, problems, and common difficulties and possible solutions to guide you towards resolving those issues. This section includes the following troubleshooting topics:

● Troubleshoot the RealPresence Trio Visual+
● Troubleshoot the Calendar
● Login
● Content Sharing

Troubleshoot the RealPresence Trio Visual+

If your or the far-end's video stream or content is not displaying on the monitor, you need to check the status of the RealPresence Trio Visual+ and make sure the accessory is on and paired with the RealPresence Trio 8800.

To check the status of the RealPresence Trio Visual+:

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

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

Troubleshoot the Calendar

When you do not see the Calendar icon on the Home screen, or you are not receiving meeting reminders, it is possible that the system is not connected to the Microsoft Exchange Server. You can check the status of the calendar to make sure it is connected to the Exchange Server.

To check the status of the Calendar feature:

1 Navigate to **Settings > Status > Calendar**.
2 On the Calendar screen, make sure the **Status** field includes **Connected to server**.
3 If the status of the Calendar states that it is not connected to the server, contact your administrator.

Login

If the system has incorrect login credentials, or if you need to re-submit Login Credentials, one of the following occurs on the system:

● A message notifying you that your login credentials are invalid is displayed on the screen.

● A message notifying you that your login credentials are invalid scrolls in the status bar.

● The Calendar icon is not displayed on the Home screen.

See the section Logging Into and Locking RealPresence Trio 8800 for more information on entering your login credentials or contact your system administrator.

Content Sharing

If your content is not showing, try one of the following solutions:

● In the RealPresence Desktop or Mobile application, make sure SmartPairing is enabled and your device is paired with the room system.

● In the RealPresence Desktop or Mobile application, disable and re-enable SmartPairing, and pair your device with the room system again.

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

● Contact your system administrator for additional help.

Camera

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

● Check that the RealPresence Trio Visual+ is paired and connected with the RealPresence Trio 8800 (see the section Troubleshoot the RealPresence Trio Visual+).

● Disconnect the USB camera from the RealPresence Trio Visual+ then reconnect the camera.

● Make sure the USB camera is a supported camera, which is a Logitech Webcam C930e.

● Contact your system administrator for additional help.