



PLEASE READ

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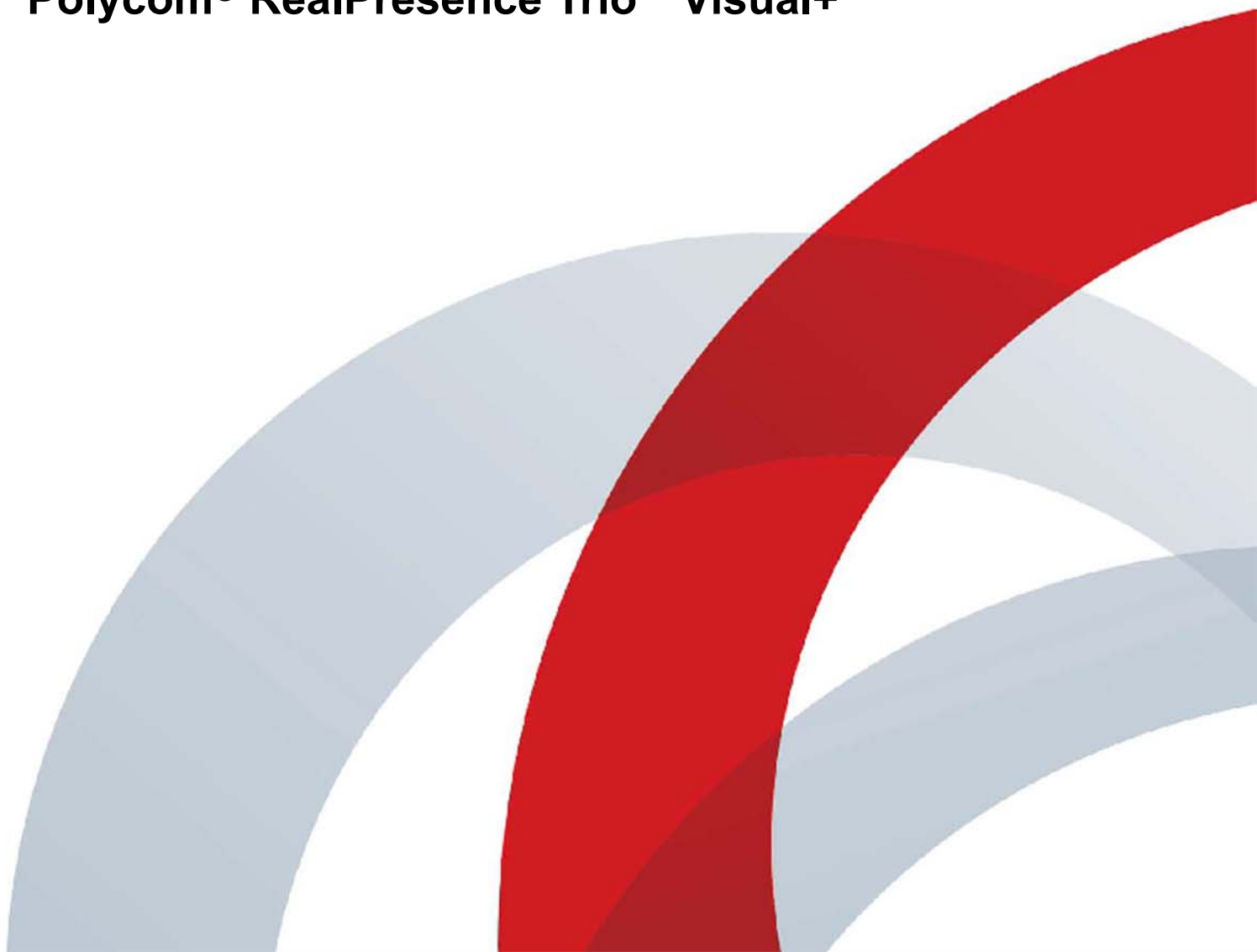


USER GUIDE

UC Software 5.4.4 | December 2016 | 3725-20598-003A

Polycom[®] RealPresence Trio[™] Solution

**Applies to Polycom[®] RealPresence Trio[™] 8800 and
Polycom[®] RealPresence Trio[™] Visual+**



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Before You Begin

This *Polycom RealPresence Trio Solution User Guide* contains overview information for the Polycom® RealPresence Trio™ 8800 audio conferencing system and the Polycom® RealPresence Trio™ Visual+ content and video accessory.

Audience, Purpose, and Required Skills

This guide is intended for beginning users, as well as intermediate and advanced users who want to learn more about the solution's features.

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 the system and its features. This section details the system's components, the screen layout, and how to navigate the system.



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

RealPresence Trio 8800 supports audio-only conference calls with Open-SIP voice platforms along with point-to-point, bridge, and video calls.

When paired with the RealPresence Trio Visual+ content and video accessory, you can stream video and share 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.
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 drive or connect a computer using a USB cable.
4	Device Port	Enables you to connect a mobile or tablet device to the system using a USB device cord.
5	Speaker and Microphones	Provides audio for the ringer and speakerphone and sends your audio to the far-end.
6	Mute key	Mutes the microphones during calls and conferences. The key glows red when activated.
7	Volume keys	Adjust the volume of the audio from the speakerphone and ringer.

Navigating the System

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.

Accessing User Screens

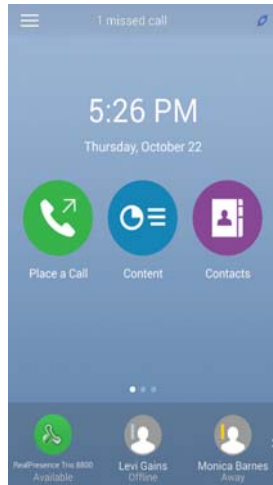
The following screens display on the RealPresence Trio 8800:

- 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.

Access the 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.

Home screen and Page Indicator



To access the Home screen:

- » Tap and tap Home.

Expand or Contract the Home Screen

A Page Indicator shows underneath the Menu options of the Home 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.

To expand or contract the Home screen:

- 1 Press and hold the Page Indicator.

Accessing the 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.

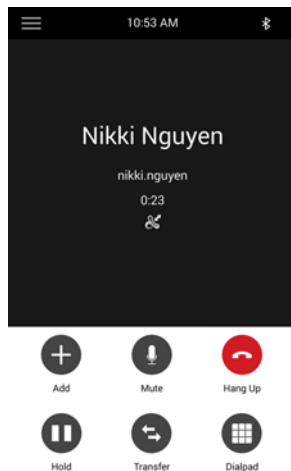
Place a Call screen



Accessing the Calls Screen

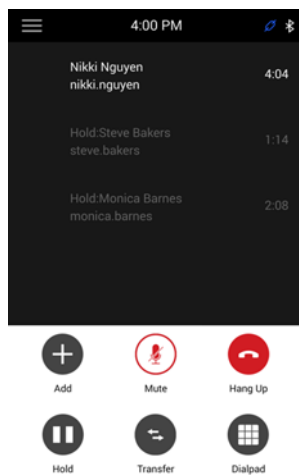
The Calls screen is displayed automatically when you place a call and you have an active call in progress. When you have an active call in progress, the name and number of the contact you are talking with and the duration of the call is displayed in the Calls screen, as shown next.

Active call on the Calls screen



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

Two calls on the Calls screen



Icons and Status Indicators

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






Icons and Status Indicators

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

Enter Information Using the Onscreen Keyboard

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

-  Shows alphabetical letters
-  Shifts to uppercase letters.
-  Shifts to lowercase letters
-  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.

Close the Onscreen Keyboard

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

To close the onscreen keyboard:

- » Tap **Done**.

Logging Into and Locking the System

You can lock the RealPresence Trio 8800 and log in to the system with login credentials.

Logging into the System

If your system administrator has enabled users to sign in to their user accounts on the system, you can log into the system to access and view 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.



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 System

Depending on how your system administrator set up the user login feature, you may need to log in to the system before you can use the system. When you log in, you have full access to your personal settings and your directory.

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**.

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 User Login Password

You can change your login 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.

Locking the System

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.
- 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.

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 [Rejecting Calls with Enable Do Not Disturb](#)).

If 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.

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**.

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**.

Audio Calls

The system can manage a maximum of 12 active, incoming, and held audio calls at a time on one registered line. However, you can have only one active call in progress with numerous other incoming calls or calls on hold.

The system can only have one registered line.



Placing Audio Calls

You can place audio calls on the system 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 a Call

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


To place a call:

- 1 Tap **Place a Call**.
- 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 **Place a Call** screen, quickly tap the **star key *** twice.
A plus sign + is displayed.
- 2 Enter the number and tap .


Place a Call from Recent Calls

You can place calls from Recent Calls, which has calls that were recently placed, answered, or missed. See the section [View Recent Calls](#) for more information on recent calls.

To place a call from Recent Calls:

- 1 Navigate to **Recent Calls**.
- 2 From the **Recent Calls** screen, select a contact.
The call is automatically placed after you select a contact.

Place a Call to a Favorite

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 with an avatar . 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.

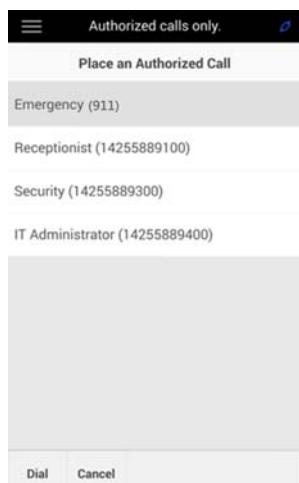
To call contacts from the directory search screen:

- 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 from a Locked or Logged Out System

When the system 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. For more information, see the section [Logging Into and Locking the System](#).




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** .




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 Bluetooth Devices and Laptops](#) 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.

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.

Answering Audio Calls

When you receive an incoming call on the system, you can choose to answer the call in various ways.

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



Decline



Answer



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.



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 [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 System](#)), 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 an Intercom Call

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 answer an intercom call:

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

Handling Incoming Calls

When you receive an incoming call, you can choose to decline the call instead of answering. You can also enable Do Not Disturb to reject all calls for a brief time period or set up Call Forwarding to automatically forward calls sent to your line.

Decline an Incoming Call

You can decline an incoming call and send the call directly to voicemail. Declined calls display in the Missed Calls list in Recent Calls. 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.

Rejecting Calls with Enable Do Not Disturb

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.

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.

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.

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**.

End an Audio Call

You can end an active call on the system at any time. You cannot end calls on hold. You must resume held calls before ending them.

To end active calls:

- » Do one of the following:
 - Tap **Hang Up** .
 - In the Calls screen, select the call and tap **Hang Up** .
 - From the Calls screen, select a held call, 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 a Call

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 a Call

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

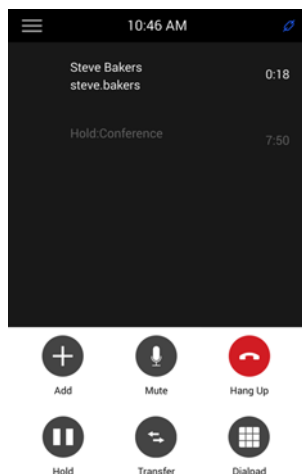
If a contact does not answer the transfer or you want to remain speaking with the contact on your line, you can cancel the transfer before it is complete.

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.




Audio Call Settings

On RealPresence Trio, you can mute and unmute the microphone and change the volume of the ringtone or audio during calls.

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.

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.

Conference Calls

You can initiate and manage up to 12 audio conference 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 [Video Calls](#) for more information on video conference calls.

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.

Initiating Conference Calls


You can initiate a conference call with four contacts, and you can also 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](#).

Initiate a Conference Call

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

End a Conference Call

By default, when you end a conference call, your connection to the call ends, and the other participants in the conference remain in the call. However, your system administrator can set up 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 a Conference Call

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 a Conference Call

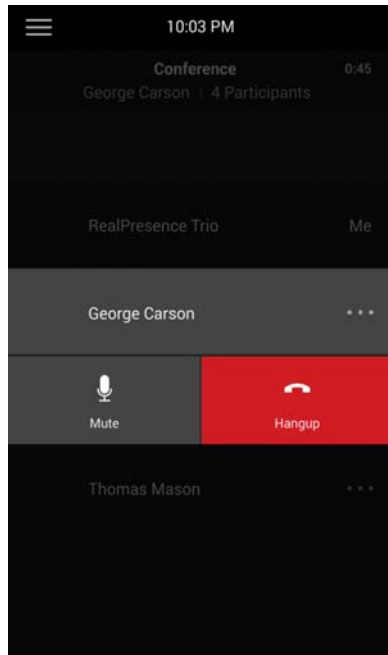
Resuming a held conference call enables all participants to hear the audio of everyone on the call.

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.

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.

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.



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.

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.

Set the Video Layout for the Meeting

During a video call, you can choose how video from meeting participants display on the monitor. You can choose any of the following options:

- **Auto (default)**—The system chooses the best layout for the call.
- **Gallery View**— Shows up to five meeting participants. If content is displayed when the maximum number of participants is active, the content replaces one participant. When there are less than five participants, self-view displays.
- **Picture-in-Picture (PIP)**—Displays self-view or the active talker. The PIP displays in or on the meeting content
- **Full Screen**— The video of the active speaker or the meeting content displays in full screen.

To set the video layout for the meeting:

- 1 During a video call, tap **Layout**.
- 2 Select a layout option.

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 (default)**—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 Tap **Video Screen Mode (Full Screen)**.
- 3 Select **Normal, Full, or Crop**.
- 4 Tap **Save**.

Place a Video Call

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

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**.
- 3 In the Call screen, tap **Start Video**, if needed.

Stop Sending Video during a Call

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:

- » In the Call screen, tap **Stop My Video**.

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



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.

Start Video During an Audio Call

When you place an audio-only call, you can start sending video at any point during the call if a camera is connected to the system. After you start sending video, you can mute your video, but you cannot stop sending video and return to an audio-only call.

To start video during an audio-only call:

- » In the Call screen, tap **Start My Video**.

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.



Viewing all video participants requires the use of a Polycom Video Conference Bridge. For more information, contact your Polycom reseller.

Handling 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.

Record Audio Calls

When a USB flash drive is connected to the system, you can record audio calls onto the drive. Recordings are stored as .wav files on the USB flash drive, and you can record up to four hours in one file. You can replay recordings on the system or on a Apple or Windows computer.

Guidelines when Recording Calls

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

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

Record a Call

You can record all audio active calls on the system. You cannot record video calls or record when there are no connected calls, when you place a new call to transfer a call or initiate a conference, or when you have an incoming call.

Make sure to inform your contacts on the call before you begin recording.

To record a call:

- » During an active call, select  >  **Start Recording**.

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

Pause a Recording

You can pause a recording during a call at any time while the call is active.

To pause a recording:

- » Select  >  **Pause Recording**.

The paused recording icon  displays at the top of the call screen.

Resume a Recoding

When you resume a recording after pausing, the recording continues within the same file.



To resume the recording:

- » Select  >  **Resume Recording**.

Stop Recording

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

To stop recording:

- » Do one of the following:
 - Select  >  **Stop Recording**.
 - Select **End Call**.



Caution: Removing a USB flash drive during a recording

Polycom recommends that you do not remove the USB flash drive while recording. The file being recorded will be incomplete and cannot be played back later. When you remove the USB flash drive while recording, you can also damage the flash drive.

Browse Recorded Calls

You can browse the recorded files stored on the USB drive and view system recordings.

To browse recorded files:

- » Navigate to **Settings > Features > Removable Storage Media > Browse Recordings**.
A list of recordings is displayed.

Play Recorded Calls

You can play back calls that you recorded on your USB drive on the system. You can also play recorded files on a Windows or Apple computer using an application capable of playing .wav files.

To play a recorded call:

- 1 Navigate to **Settings > Features > Removable Storage Media > Browse Recordings**.
- 2 Select a file, and select **Open**.
- 3 Select **Play**.

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



Note: You cannot play recordings during active calls

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

Pause and Resume Played Recordings

While you're playing a recording, you can pause the recording, perform another tasks on your phone, and resume the recording at any time.

To pause and resume a recording:

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

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

Stop Playing a Recording

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

To stop playing a recording:

- » Select **Exit**.

Rename a Recording

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

To rename a recording:

- 1 Navigate to **Settings > Features > Removable Storage Media > Browse Recordings**.
- 2 From the **Browse Recordings** screen, select a recording.
- 3 Select **Rename**, update the filename, and select **OK**.

Delete Recordings

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

To delete a recording:

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

- 2 From the **Browse Recordings** screen, select a recording.
- 3 Select **Delete**.

Sharing 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 or devices to show content:

- Polycom® RealPresence® Desktop
- Polycom® RealPresence® Mobile
- Polycom® People + Content™ IP

Sharing Content with RealPresence Desktop or Mobile

To share content during a call, 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.

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

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

See the [RealPresence Desktop](#) and [RealPresence Mobile](#) support pages for information on sharing content with a room system.

Sharing Content with People+Content IP

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

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

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

Share 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, do one of the following:
 - On a Windows computer, navigate to **My Computer** and click the **People+Content IP** folder.
 - On a Mac computer, navigate to **Finder** then search for and run the **People+Content IP** application.
- 2 Enter the IP address 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 Sharing 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.

Share Content with People+Content over USB

You can connect your Windows or Mac computer over USB to the RealPresence Trio 8800 system and show content using the People+Content IP application. Video and data sent using the People + Content application is sent over the USB cable and no network connection is required.

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, do one of the following:
 - On a Windows computer, navigate to **My Computer** and click the **People+Content IP** folder.

- On a Mac computer, navigate to **Finder** then search for and run the **People+Content IP** application.
- 3** Open the content you want to show, and click ►.

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.

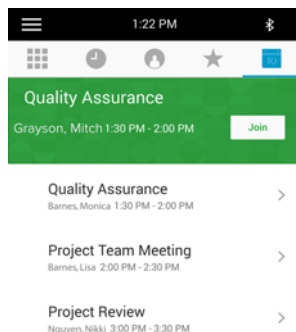
Open the Calendar

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

To open the calendar:

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

The calendar displays your meetings for the day, as shown next.

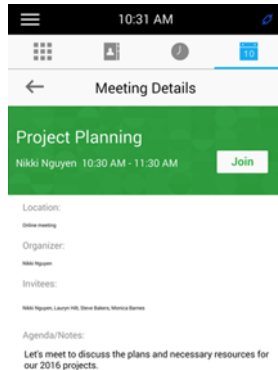


If you select Calendar, and the Calendar does not display, it is possible your login credentials are incorrect or the Calendar is not connected. See the section [Check the Status of the Calendar](#) for more information.

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.

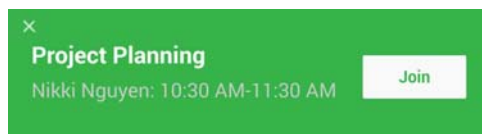
To return to Day view:

- » Tap ←.

Meeting Reminders

By default, the system displays a meeting reminder 5 minutes and 1 minute before a meeting starts. When the meeting reminder displays, the system emits an alert tone. From the reminder, you can join a meeting and view meeting details. The following figure shows a meeting reminder.

Meeting Reminder



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.



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**.

Joining a 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.

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 BroadSoft Directory, depending on your server and if enabled by your system administrator.



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.

Recent Calls

The RealPresence Trio 8800 system maintains a Recent Calls list that 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.

View Recent Calls

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

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 ⓘ 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  next to a call record.
- 2 Tap .
- 3 Edit the number then tap .

Managing the Local Directory

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

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

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.

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.

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; you can swipe the screen from right to left to display additional favorites. Favorites also display at the top of the list of contacts in the Local Directory.

Add Favorites

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

To add a contact as a Favorite:

- 1 Navigate to **Contacts > Local Directory** and select a contact.
- 2 On the **Details** screen, tap ★.
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**.

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.



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**.

Voicemail and Pages

You can send, broadcast, and access a variety of audio, verbal, video, and written messages on RealPresence Trio 8800.



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.



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.



Contact your system administrator or service provider for information on remotely accessing your voicemail.

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 Bluetooth Devices and Laptops

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.

Connecting Devices using Bluetooth

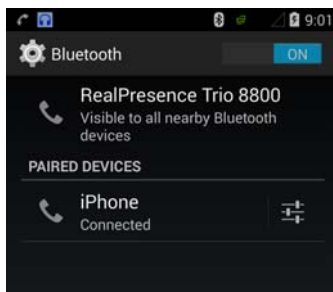
The Bluetooth feature on the RealPresence Trio 8800 enables you to place calls on your mobile phone and use the system as a speakerphone for the call (see the section [Place a Call over Bluetooth](#)). You can also use the system to play audio from media, such as music or videos, from your mobile phone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

Make the System 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.

You cannot connect to a Bluetooth device when you are in a call on the system.

To connect a Bluetooth device:

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

Connect a Bluetooth Device Using Near Field Communication

You can connect a Bluetooth-capable mobile phone or tablet with the system 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 device 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 system as a Bluetooth speaker for music or videos played on your mobile phone or tablet.

To play audio from a Bluetooth device:

- 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 laptop, 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 the System

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	<ul style="list-style-type: none">Windows 8.1 (32-bit or 64-bit)Windows 8 (32-bit or 64-bit)Windows 7 (32-bit or 64-bit)OS X 10.9.x (Maverick)OS X 10.10.x (Yosemite)OS X 10.11.x (El Capitan)
Desktop client or application	<ul style="list-style-type: none">Polycom RealPresence Desktop
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 a Device or Laptop

When connected to a laptop or mobile device, you can use the system to play audio from video 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 device to the system using USB:

- » Connect a USB or Micro-USB cable from your computer or device 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, and for your laptop.

Set the System 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 in RealPresence Desktops:

- 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 the System 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.

System Settings

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.

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.

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.

Set the Time and Date Display

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.

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

Formatting Numbers

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

To choose the number format:

- 1 Navigate to **Settings > Preferences > Number Formatting**.
- 2 Select **Enable** or **Disable**.

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.

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.

Control Where Audio Plays

You can choose to have audio play from the system's speakers or from the monitor or external speakers connected to the RealPresence Trio Visual+. You can also choose to let the system automatically play audio from audio calls on the system and audio from video calls on the connected monitors or external speakers.

To control where audio plays:

- 1 On the system, navigate to **Settings > Basic > Preferences > Audio Output**.
- 2 Choose one of the following:
 - Choose **Phone Speakers** to play audio on the system only.
 - Choose **TV Speakers** to play audio from the connected monitor or external speakers.
 - Choose **Automatic** to let the system choose where to play audio based on the call type.

Accessibility Features

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

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 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.

Maintaining the System

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.

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.



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.



If the screen is still dirty after cleaning, 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.

Check the Status of 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.

Check the Status of 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.

Tips for Resolving Content Sharing Issues

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

- Make sure your device is on the same network as the room system.
- Contact your system administrator for additional help.

Tips for Resolving Camera Issues

If the 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 [Check the Status of 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.