



Poly

RealPresence Trio™

8500 | 8800

User Guide

MOMENTUM

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About Polycom Trio™

Before using the RealPresence Trio, take a few moments to familiarize yourself with the system and its features. As you read this guide, keep in mind that certain features are configurable by your system administrator or determined by your network environment. As a result, some features may not be enabled or may operate differently on your device. Additionally, the examples and graphics in this guide may not directly reflect what is displayed or is available on your device screen.

Overview of RealPresence Trio Features

RealPresence Trio supports audio-only conference calls with Open-SIP voice platforms along with point-to-point, bridge, and video calls, and when paired with the RealPresence Trio Visual+ content and video accessory, can stream video and share content for all calls on the RealPresence Trio.

Features and capabilities for the RealPresence Trio series include:

Trio 8500	Trio 8800
<ul style="list-style-type: none"> ▪ Placing, answering, and managing audio calls ▪ Initiating, joining, and managing audio conference calls ▪ Recording audio calls with USB flash drives ▪ Viewing and joining scheduled calendar meetings ▪ Managing contacts, call lists, and directories ▪ Adjusting call and system settings ▪ Pairing with Bluetooth-enabled devices ▪ Checking voicemail messages ▪ Connecting to a computer over USB ▪ Sharing content during video calls ▪ Placing, answering, and managing video calls ▪ Pairing with the Polycom Trio Visual+ content and video accessory ▪ Pairing with the Trio VisualPro content and video accessory ▪ Pairing with the Polycom® RealPresence® Group Series system ▪ Placing video calls with a Polycom® EagleEye™ Mini USB camera or Logitech C930e webcam ▪ Adjusting the camera and setting camera presets for a connected USB camera 	<ul style="list-style-type: none"> ▪ All features and capabilities offered by Trio 8500 AND ▪ Sharing content from Apple® AirPlay®- or Miracast®-certified devices ▪ Placing, answering, and managing video calls ▪ Pairing with Bluetooth- and Near Field Communication (NFC)-enabled devices ▪ Connecting to a wireless network ▪ Pairing with the Polycom Trio Visual+ content and video accessory ▪ Pairing with the Trio VisualPro content and video accessory ▪ Pairing with the Polycom® RealPresence® Group Series system ▪ Placing video calls with a Polycom® EagleEye™ Mini USB camera or Logitech C930e webcam ▪ Placing video calls with a Polycom® EagleEye™ IV USB camera or Polycom® EagleEye™ Director II camera ▪ Adjusting the camera and setting camera presets for a connected USB camera

The RealPresence Trio offers impressive features to make conferencing and communicating easy.



1. **Touchscreen** – Select items and navigate menus on the touch-sensitive screen.
2. **NFC** – Connect a Bluetooth-capable device using Near Field Communication (NFC)
3. **USB Port** – Connect a USB flash drive or computer via USB cable.
4. **Device Port** – Connect a mobile or tablet device via USB or Micro-USB cable.
5. **Speaker/Microphones** – Provides audio for the ringer and speakerphone, and to the far-end in a call.
6. **Mute Key** – Disables microphones during calls and conferences. The key glows Red when activated.
7. **Volume Keys** – Adjust the audio volume for the speakerphone and the ringer.

Access Trio

Trios have icons, status indicators, and screens to help you navigate the user interface and understand important information on the state of the solution. For some systems, the Trio may be setup to require login to make use of feature and functionalities beyond making or accepting calls.

System Log In

When System Log In is enabled, users will receive log in credentials and must log into their user accounts on the Trio to access and view their personal Local Directory, Contact Favorites, and Custom Settings. *Request user access credentials from your system administrator.*

Any setting changes made while logged into the system are saved for your login and displayed the next time you log into the system.

Emergency calls may be placed while the system is locked. Calls to pre-defined authorized numbers may also be placed when a user is logged out if the system administrator enables these functions.

Log In

If a log in is required to use the system, the User Login screen displays:

1. Enter the requested User ID and Password.
2. Press **Log In**.



If the User Login Screen is not displayed, navigate to: **Settings > Features > User Login > Log In** and follow the steps above.

When the login credentials are accepted, the related profile displays. If the credentials are not accepted, a message indicating the log in failed is provided and the User Login screen becomes available again for a retry. Contact the system administrator for assistance or to confirm the login credentials.

Log Out

After using Trio, log out to prevent access to your personal settings.

1. Tap **Log Out** or navigate to **Settings > Features > User Login > Log Out**
2. Tap **Yes** to confirm when prompted.

The system redisplay the User Login screen or the Default Profile for the Trio, as defined by the administrator.

Change System Log In Password

To change your login password from any Trio on your network:

1. Navigate to **Settings > Features > User Login > Change User Login Password**.
2. Enter the requested password information (Old and New passwords).
3. Tap **Enter** to save the change when finished. Use the new password the next time you log in.

System Lock

Locking the system is an option to protect information and ensure users must log in to use the system. When in use, the system administrator provides users with a password to unlock the system and to answer calls when the system is locked. When the system is locked, users may:

When System Lock is enabled, users may:

- Make outgoing calls to authorized numbers (where enabled and defined).
- Enter a password to answer incoming calls.
- See the status bar 'System Locked - only authorized calls are allowed' message. No other messages display while the system is locked.
- Set to **Allow Ringing When Locked** (Default setting) when locking the system. Incoming calls ring on the system, and may be answered by entering a user password. See the section Answer Calls on a Locked System for more information.
- Set to **DND When Locked** when locking the system. This setting applies to all lines. The system does not ring for incoming calls.

Lock the System

To lock the system after usage:

1. Navigate to **Settings > Basic > Lock Phone**.
2. Select **Allow Ringing When Locked** (default) or **DND When Locked**.
3. Tap **Lock**.

Unlock the System

The system may be unlocked using a password provided by the administrator.

1. Tap **Unlock**.
2. Type the password when prompted.
3. Tap **Enter**.

Change System Lock Password

Access to the password-protected *Advanced* Settings menu is required to change a system lock password. Contact the administrator for help with accessing Advanced settings.


1. Navigate to **Settings > Advanced**.
2. Type the *Administrator* password when prompted.
3. Tap **Enter**.
4. Type the requested information (old and new passwords).
5. Tap **Enter** again when finished to save the change.

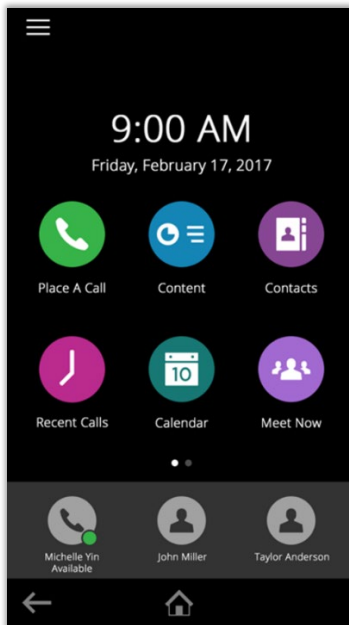
Main User Screens

The following main screens display on the RealPresence Trio when in use:

Home Screen

Tap the Home  icon
or

Tap the Menu  icon
(top of the touchpad) and
then Tap Home



The [Home Screen](#) displays your messages, settings, feature options, and system information. Additional features are listed in multiple pages, swipe left or right to view more pages, or press and hold the page indicator icon to view all feature options at once.

Place a Call Screen

Tap the [Place a Call](#) icon

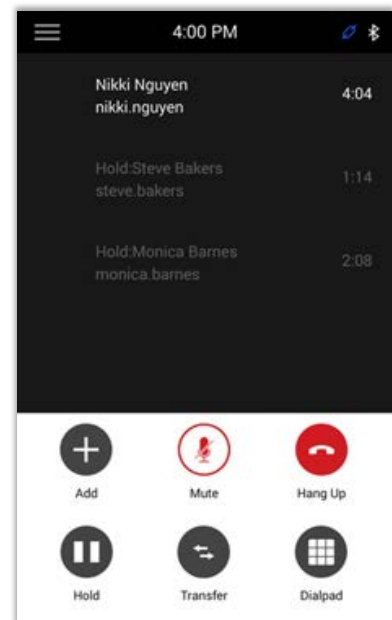


The [Place a Call Screen](#) enables quick access to the dial pad, onscreen keyboard, and your Contacts, Recent Call history, and the Calendar views.

This screen view may also be displayed when the system is idle if setup by the administrator.

Calls Screen













Displays during active calls and offers access to in-call features, including **Add**, **Mute**, **Hold**, **Transfer**, **Start Video**, **Hangup**, etc.



The [Calls Screen](#) displays any active and held calls on the line in a list, and provides access to the call details and in-call feature options for each call.






Icons and Status Indicators

The key icons and status indicators that display on the touchscreen, include:


Icon	Description	Icon	Description
	Registered Line		Do Not Disturbed enabled
	Unregistered Line		Call Forwarding enabled
	Active Call		Wireless status (Polycom Trio 8800 only)
	USB device attached		Paired Device
	Missed Call		Bluetooth
	Placed Call		Received Call

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. The following keyboard icons display to offer access to modify the characters or change the character types as needed:


-  Shows Alphabetical characters (letters) for selection
-  Shifts to uppercase letters
-  Shifts to lowercase letters
-  Displays numbers and punctuation marks for selection
-  Displays special characters for selection

Access the Keyboard

1. Tap the Keyboard  icon if available on the screen - Or, tap on a *Text field* to automatically open the Keyboard.
2. Press your finger on the character type icon to select the type of characters you wish to enter.
3. Press your finger on the individual character(s) you wish to enter.
4. Tap **Done** when finished.

Manage Keyboard Language Layouts

Users can enable multiple languages for the device and switch between keyboard layouts as needed when the [Phone Language and Country](#) is setup, the phone uses the default keyboard layout for that language. For example: For English, the **QWERTY** keyboard is the default and French/France uses the **AZERTY** keyboard layout. To manage keyboard language layouts:

1. Long-press and release the **comma** key.
2. Choose **Input Languages**.
3. Uncheck the **Use System Language** option.
4. Select one or more available languages to enable them for usage.
5. Press the **Back**  arrow when finished to enable the language(s) and keyboards.

If more than one language is enabled, a globe key displays on the phone keyboard to notify users that multiple language/keyboards are available for selection by using:

- **Long-press on the globe key** to view and choose from a list of enabled languages. The phone uses the default keyboard layout for the language you choose.
- **Short-press on the globe key** to rotate through any enabled languages and select. The space bar displays the current language and keyboard layout.

Audio Calls




The system has one registered line and can manage a maximum of twelve (12) active, incoming, and held audio calls at a time on this line.

Mute

Users can mute the microphone so other parties cannot hear. Users can still hear all other parties when the microphone is muted.




Mute Audio

To use the Mute feature during or prior to initiating 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

Tap the **Mute** button again to unmute your audio when you are ready to speak and let your contacts hear. During a call, users may do one of the following:

- Tap **Unmute** .
- Tap the Mute key  on the system.
- Tap the Mute key  on the microphone.




Volume

Users can increase or decrease 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.



Place 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 place an Intercom call to a specified contact.



Local / IP Call

1. Tap **Place a Call** 
2. Enter your contact's number.
Or tap the onscreen keyboard  and enter an IP address.
3. Tap the dial icon  to place the call.


International Call

1. Tap **Place a Call** 
2. Quickly tap the * key twice to add the + sign.
3. Enter the international number.
4. Tap  to Dial.

Redial the Last Caller


1. Tap **Place a Call** 
2. Tap the  **Recent Calls** icon.
3. Tap on the first number in the list.

Call From Recent Calls

1. Tap  **Recent Calls**.
2. Tap on the desired listing to automatically dial that number.


Call From a Directory

To place a call to a Contact in a directory you can:

- Go to **Contacts > Select a Directory**
- Or, Tap **Place a Call**, tap the Contacts icon , and select the desired Directory.
- Or, Select a **Contact** or a **Favorite**.

Then Tap the  handset icon next to the number you wish to dial to initiate a call.

Call a Favorite

Simply Tap on a **Favorite**  on the Home screen to dial that number.


Bluetooth Call

On a Bluetooth enabled device:

1. Select RealPresence Trio in the Bluetooth setting.
2. Dial or place a call to a contact on the device.
3. Select the **RealPresence Trio** as the audio source when prompted.

Locked / Logged Out Call

Trio systems can be setup to allow calls to specific Authorized calls when the device is locked.

1. Tap **New Call**.
2. Select a number from the **Authorized Call** list display.
3. Tap  to dial.



Note: Any listed Authorized Call Numbers provided are pre-defined by the administrator.

Place Intercom Calls

Check with the system administrator to find out whether this feature is available on the system.

The intercom allows users to place a call to a contact that is answered automatically on the contact's phone if the contact is not on an active call. If the contact's line is active, the contact can choose to answer the intercom call immediately, or the intercom call will be answered automatically after the active call ends.




Use the Intercom

1. Tap **Intercom**.
2. Enter a number or select a **Contact**.
3. Tap  to Dial.
4. Speak after the tone.
5. Wait for a reply, or tap  **Hangup** if no reply is needed.

Note: The system administrator can set up the system to automatically call a specific contact number when the Intercom soft key is pressed. If the system is set up this way, press the Intercom soft key and wait for the call to be answered before speaking.

Use Intercom During a Call

While in an active call:

1. Press **Hold**  for the call.
2. Tap **Intercom**.
3. Enter a number or select a **Contact**.
4. Tap  to dial.
5. Speak after the tone or when the call is answered.
6. Tap **Hangup** when finished.
7. Select the On Hold call and tap **Resume** .


Answer Audio Calls

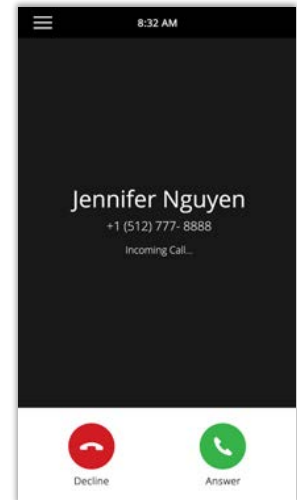
When the system receives an incoming call, the system rings and displays the Incoming Call Screen.

Answer an Incoming Call

Tap **Answer**  to take the call.

If an incoming call is received during an active call on the same or different line, a call waiting tone beeps, and the Incoming Call window is displayed.

If on a call, tap **Answer**  to take the new call and the prior call is placed on hold.



Auto Answer Calls

The system can be setup to automatically answer calls using the [Auto Answer](#) feature. When this feature is enabled, the system automatically answers all incoming calls using the speakerphone. The system administrator sets how many times the system rings before the call is automatically answered. The user may define usage, and microphone and video settings.


If an incoming call is received while the user is in an active call, the incoming call will not auto-answer until the active call is ended or placed on hold.

To Manage your Auto-Answer preferences (where enabled for use):


1. Navigate to **Settings > Basic > Preferences > Auto Answer**.
2. **Auto Answer SIP Calls:** Tap **Yes** to enable or **No** to disable.
3. Define the following, as desired:
 - **Microphone Mute:** Tap **Yes** (default) to mute the microphone for auto-answered calls.
 - **Select Video Mute:** Tap **Yes** to mute the video when video calls are auto-answered. The default setting is No which allows video automatically.
4. Tap **Save** when finished to update the system with the setting changes.

Answer Calls on a Locked System

When the system is set up so that you can answer incoming calls when locked (Ref. [Lock the System](#)), you can answer calls by entering your user password. To answer a call on a locked system:

1. Tap **Answer**  in the incoming call window.
2. Enter your user password.
3. Select **Enter** to connect the call.

Answer an Intercom Call





When an intercom call is received on the system, the speakerphone is used to answer automatically. If the system is set up to answer intercom calls with the microphone muted, the microphone must be unmuted to respond. Simply tap the **Mute**  icon to unmute and use the speakerphone to reply.

Decline Incoming Calls

Select **Decline**  in the incoming call window. The call will go directly to voicemail if that is setup.


End Audio Calls

Active calls may be ended on the system at any time, however calls on hold must be resumed first. To end active calls, do one of the following:

- **Current Call:** Tap **Hang Up** 
- **Viewing Multiple Calls:** Select the call and tap **Hang Up** 
- **On Hold Call:** Select the call, tap **Resume** , then tap **Hang Up** 

Use Do Not Disturb

When Do Not Disturb (**DND**) is enabled, 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 the *New Message Notifications* or *Forwarding* features are enabled, a related icon is displayed instead.

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

Enable Do Not Disturb

Do Not Disturb (**DND**) may be enabled 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/Disable**.

Enable Do Not Disturb for One Line

Do Not Disturb can be enabled for a particular line rather than all lines.

1. Navigate to **Settings > Features > Do Not Disturb > Line Select**
2. Select the desired line.
3. Then tap **Enable** for Do Not Disturb.

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.

Disable Do Not Disturb


Do Not Disturb can be disabled when you are ready to resume receiving calls again.

To disable Do Not Disturb:

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

Forward Incoming Calls


Users can choose to forward an incoming call to a contact or to forward all incoming calls to a contact. This feature cannot be used on shared lines.

1. In the **Incoming Call** screen, tap **Menu**  and select **Forward**.
2. In the *Call Forwarding* screen, enter the number calls should be sent to, and tap **Forward**.

Forward All Incoming Calls to a Contact

Users 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. **Note:** *For shared lines, **Always** is the only forwarding option.*

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 (9) rings.

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

Disable Call Forwarding

Disable call forwarding when you no longer want to forward calls.


1. Navigate to **Settings > Features > Forward**.
2. Select a line (as needed).
3. Open **Forwarding Type Select**.
4. Tap **Disable Call Forwarding**.

Hold and Resume Calls

Users may 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 from the Calls screen:

1. Highlight the call you wish to place on hold.
2. Tap **Hold** .

Resume a Call

View and resume a held call in the Calls screen:

1. Select the desired on hold call to highlight it.
2. Tap **Resume** .

Transfer Calls

Users may define a default transfer type to use for all calls or choose a transfer type during a call. When a default transfer type is defined, the system uses the set transfer type for all calls when the Transfer soft key is used. Active or held calls may be transferred to another contact or line using the following transfer types:

- **Blind transfer** - Transfer calls directly to another line without speaking with the other party first.
- **Consultative transfer** – (system default) Speak with the other party before completing the transfer.

Choose a Default Transfer Type



Define a default transfer type to use for all calls:

1. Navigate to **Settings > Basic > Preferences > Default Transfer Type**.
2. Choose a transfer type (Blind or Consultative).

The selected transfer type is used for all calls going forward when the Transfer soft key is pressed.

Transfer a Call

Calls may be transferred to another contact using either transfer type during a call.

1. Tap the **Transfer**  soft key to use the default transfer type (consultative is the default).
2. Dial a number or choose a contact from Contacts or Recent Calls.
 - If the transfer type is set to **Blind**, the call is transferred immediately.
 - 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 wish to resume the call on your line, you can cancel the transfer before it is complete by tapping the **Cancel** button. The transfer action is abandoned and the held call on the line becomes the active call.

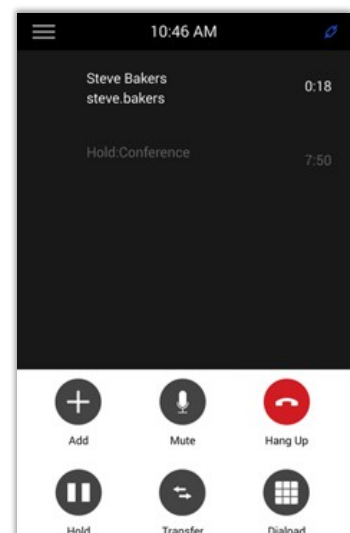
Manage Multiple Calls

Users can manage multiple calls that are active, incoming, or held on the system. The Calls screen provides a view of all active and held calls, including conference calls. The example here shows an active call and a held conference call.

Manage Calls from the Calls Screen

Within the Calls screen, calls may be placed on Hold, Resumed, Transferred, or ended as needed.

1. Tap to select a call.
2. Choose an action:
 - Select **Hold**  to place an active call on hold.
 - Select **Resume**  to make a held call active.
 - Select **Transfer**  to send the call to another contact.
 - 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.



Record Audio Calls

A USB flash drive can be connected to a Polycom Trio system to be used to record audio calls onto the drive. Recordings are stored as .wav files on the USB flash drive. Users can record up to four hours in one file and replay the recordings on the system or on a computer.

Recording Guidelines

Recommendations for 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

All currently active audio calls can be recorded. Calls cannot be recorded as a new call is initiated to transfer or start a conference, or when a call is still incoming. Make sure to inform contacts on the call before beginning a recording. Note that some tones made on your contact's phone are recorded. When the microphone is muted while recording, your audio is muted and only other participants' audio in the call is recorded.

During an active call, tap **Menu**  and select **Start Recording** .

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

Call Recording Tasks

While recording and audio call, the user can manage the recording feature to pause, resume and stop whenever needed.


Pause During a Recording

Select **Menu**  and tap **Pause Recording** .

Resume During a Recording

Select **Menu**  and tap **Resume Recording** .

Stop Recording

Select **Menu**  and tap **Stop Recording** .

Or, just tap **Hang Up**.

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

Manage Recorded Calls

Once calls are recorded and saved on a USB drive, users may review, play and edit or remove those recordings from the USB drive when it is connected to Trio.

Browse Recorded Calls

1. Connect the USB flash drive to Trio.
2. Navigate to **Settings > Features > Removable Storage Media > Browse Recordings**
The list of recordings on the drive is displayed for selection and review.

Play a Recorded Call

1. Connect the USB flash drive to Trio.
2. Navigate to **Settings > Features > Removable Storage Media > Browse Recordings**
3. Tap to select a recording.
4. Tap to select **Open > Play**
The length of the recording and a progress bar display as the recording plays.

Pause and Resume Played Recordings

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

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

- Press **Pause II** to stop the recording to perform another action.
- Press **Resume ►** when ready to continue listening.

Stop Playing a Recording

Press **Exit** when you are finished listening to a recording to stop playing the recording and return to the list.

Rename a Recording

By default, recordings are labeled with the date of the recording. Users can rename recordings to provide them with more meaningful names while viewing them from the USB drive.

1. Navigate to **Settings > Features > Removable Storage Media > Browse Recordings**
2. Tap to select a recording.
3. Select **Rename**.
4. Update the file name and press **OK**.

Delete a Recording

To remove an unwanted/unneeded recording from a USB drive:

1. Connect the USB drive to Trio.
2. Navigate to **Settings > Features > Removable Storage Media > Browse Recordings**
3. Tap to select a recording.
4. Select **Delete**.

Conference Calls

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


Tips for Conference Calls

- Users can initiate a conference call with up to four contacts.
- Users can hold, resume, or split a conference call.
- While the system can manage up to 12 conference calls, only one active conference call may be in progress with numerous other conference calls on hold.
- Where enabled for use (see system administrator for assistance), the Conference Management feature allows users to mute, hold, and remove individual participants in a conference call.

Initiate a Conference Call

Initiate a conference call by adding a contact during an active call and joining the contacts into a conference call.


While on an active call:

1. Press **Hold**.
2. Enter the phone number or locate and select a Contact.
3. When the caller answers, tap the **Add +** icon.
4. Enter another contact number (or select from Contacts or Recent Calls).
5. Press **Dial** 

Upon answering, the new call is added to the conference.

Merge Calls into a Conference Call


Join one Active call and one Held Call into one conference call in the Calls Screen.

1. Select a Held Call
2. Tap the **Merge** icon. 

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

Add Participants to a Conference Call

Users may add up to four (4) participants during a conference call.

1. During a conference call, tap **Add Participants**.
2. Enter a contact's number (or select a contact from a directory or Favorites).
3. Press **Dial**. 

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

Mute a Conference Participant


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

1. During a conference call, select a participant and Tap **Mute** .

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

Remove a Conference Participant

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

1. During a conference call, tap to select a conference participant.
2. Tap **Hang Up** 


The selected participant is removed from the conference call.

Hold a Conference Call

Placing an entire conference call on hold places all participants on hold simultaneously.


Tap the **Hold**  icon.

Resume a Conference Call

Tap the **Resume**  icon to continue the conference call.

End a Conference Call

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

Simply tap **Hang Up**  to end your connection to the conference call.

Note: The administrator may also set up the system so that all call connections terminate when the initiator ends a conference call. Contact your system administrator to learn how your system has been implemented for ending conference calls.

Video Calls

When your Polycom Trio system is paired with a Polycom Trio Visual+, Trio VisualPro, or RealPresence Group Series system, you can send and receive video. If no camera is connected to your paired device when you receive video during calls, you can see your contact's video but they cannot see video from you.

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

- Polycom® EagleEye™ Mini USB camera
- Polycom® EagleEye™ IV USB camera (Polycom Trio 8800 only)
- Logitech C930e webcam

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

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

Tips for video calls

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

Video Call Settings

Video settings can be updated to change the way video calls display your Polycom Trio system. Note that if settings are updated during a call, the new settings apply to the next call and not the current call.

Note: Some of the features described in this section require access to the Basic settings menu. Contact your system administrator for assistance if Basic Settings require a password.

Manage Call Rate for Video

Trio supports call rates between 128 kbps and 768 kbps for video calls. The default setting is 512 kbps. Changes to the maximum call rate to use for a video call and the selected call rate will be applied to the next video call. If the system administrator implemented a Maximum Call Rate for Video Calls for the system, users cannot select a call rate above this limit.

1. Navigate to **Settings > Basic > Call Rate**.
2. Select the **Maximum Call Rate** to use for video calls.

Manage Near-End Video Clarity

Modify the **Target Frame Rate** to improve video clarity. The Target Frame Rate defines how smoothly video displays. Users may set a rate between 5 (least smooth) and 30 (smoothest). The default rate is 30.

1. Navigate to **Settings > Basic > Video**.
2. Select **Camera Settings > Target Frame Rate**.
3. Tap **Up** or **Down** to adjust the frame rate.
4. Tap **Save**.




Manage Near-End Video Layout

During a video call, video displayed from meeting participants may be modified.

1. During a video call, tap **Layout**.
2. Select one of the following layout options:
 - **Auto** (default) - The system chooses the best layout for the call.
 - **Gallery View** - Up to five meeting participants display. 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)** - Only self-view or the active speaker display. The PIP displays in or on the meeting content.
 - **Fullscreen** - The video of the active speaker or the meeting content displays in full screen.
3. Tap **Save**.

Manage Near-End Video Quality

Users may adjust camera settings on the Polycom Trio system to improve video quality being sent out during a call.

1. Select **Camera**  in the Call Screen or, tap **Menu**  and select **Camera**.
2. Tap **Settings**  to access *Camera Preferences*.
3. Adjust or toggle the following camera settings:
 - Brightness
 - White balance
 - Saturation
 - Sharpness
 - Backlight compensation
4. Tap **Save**.

Manage Far-End Video Display




Adjust video settings to control the appearance of video received from the far-end.

1. Go to **Settings > Basic > Video**.
2. Select **Video Screen Mode**.
3. Choose one of the following video screen settings.
 - **Normal** - The video image displays with correct proportions. Black bars appear on the top, bottom, or sides of the area to maintain the correct aspect ratio if the aspect ratio of the received video does not match the display area. The portions of the video that are not being received display as black bars.
 - **Full** - If the received video image is not the same aspect ratio as the display area, the video image is stretched to fill the area. If the aspect ratios match, no stretching occurs.
 - **Crop** - The video image is resized to maintain the correct aspect ratio. Any parts of the image that do not fit within the display area are cropped.
4. Tap **Save**.

Manage Camera Tracking



Users can modify the camera tracking settings on the Polycom Trio system. Tracking is available only when using the Polycom® EagleEye™ Director II camera or Polycom® EagleEye™ Producer camera.

During a call:

1. Select **Camera** , or Tap **Menu**  and select **Camera**.
2. Tap **Settings**  to access *Camera Preferences*.
3. Do one of the following:
 - Turn **Camera Tracking** On or Off.
 - Select a **Tracking Mode**: Frame Speaker, Frame Group, or Frame Group with Transition (available only with an EagleEye Producer camera).
 - Adjust the **Tracking Speed**.
 - Adjust the **Framing Size**.
4. Tap **Save**.

Manage Camera Position During a Call

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



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

Manage Stored Camera Presets

Store and modify camera presets on a Polycom Trio system with a connected Polycom camera. Presets aren't supported with the Logitech Webcam C930e camera. Camera presets are stored camera positions that you can create before or during a call. Presets enable you to quickly point a camera at pre-defined locations in a room and persist until you change them. The system uses preset 0 as the default camera position for all preset camera positions. This default camera position is zoomed out, panned straight ahead with horizontal tilt. If the system camera supports pan, tilt, and zoom movement, up to 10 preset camera positions for the near-end camera can be created. Each preset stores the following information:


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

Camera presets can be stored during a call or when the Polycom Trio system is idle.

1. Select **Camera**  or, tap **Menu**  and select **Camera**.
2. Adjust the camera settings to your desired position and zoom level.
3. Select **Presets** to view the available and stored preset positions.
4. Press and hold a preset position numbered 0 to 9 to save or update to the current settings.
The preset updates and displays the changes immediately if committed during a video call.



Rename Stored Camera Presets

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

1. Navigate to **Settings > Basic > Video**.
2. Select **Camera Settings**.
3. Select **Presets**.
The available and stored preset positions display.
4. Select **Edit** .
5. Select a preset and edit the name of the preset.

Place a Video Call

The system set up defined by your administrator affects whether users can place a video call to one contact.

1. Tap **Place a Call** .
2. Enter a contact's number or select a contact from a Directory or Favorites.
3. Press **Dial** .
4. Tap **Start Video** in the Call screen if video does not display automatically.

Start Video During an Audio Call

Users can start sending video at any point during an audio-only call if a camera is connected to the phone. Once video sending is started, users can mute the video call, but cannot stop sending video and return to an audio-only call.

Tap **Start Video** in the Calls screen.

Stop Sending Video

Users can stop transmitting video from the near-end at any time during a video call. Stopping video does not create an audio-only call. Even if video is stopped, video information is still transmitted to the far-end and you are still in a video call. However, when **Stop Video** is selected, the stopped video icon is displayed and the far-side cannot see a video stream.

To stop sending video, tap **Stop My Video** in the Calls screen.

Note: Trio users cannot start and stop the receipt of far-end video.

Toggle Video and Content


By default, the content automatically displays in place of participant video streams during the call when you or a video participant starts sharing content during a video call on Polycom Trio. Users may choose to display the video streams for participants or to display any content being shared using the Toggle People/Content feature.

Simply tap **Toggle People/Content** in the Calls screen.

Note: Content that is shared using Apple AirPlay cannot be hidden. Attempts to hide content may result in a message stating that you cannot hide content and must stop the content instead, depending on how the content is shared and the type of call.

Handle a Mixture of Audio and Video Calls

During a call with a person who has a video-enabled phone or video-conferencing system, the participants' video displays on the connected monitor.

For video calls with audio-only contacts in attendance, the video stream displays on your monitor, and an Audio icon  displays on the monitor with the number of contacts on audio-only.

If there is no camera connected to your paired content and video accessory (e.g., Polycom Trio Visual+ or Trio VisualPro), the Trio can receive video but cannot send video. Video always displays when a contact can send video and the system is enabled to receive video.

Share Content

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

The following applications can be used to share content:

- Polycom® RealPresence® Desktop
- Polycom® RealPresence® Mobile for Tablets
- Polycom® People+Content IP™
- Apple® AirPlay® (Polycom Trio 8800 only; not available when paired with a Trio VisualPro or RealPresence Group Series system)
- Google Miracast® (Polycom Trio 8800 only unless paired with a Trio VisualPro or RealPresenceGroup Series system)

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

Share Content with RealPresence Desktop or Mobile

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

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

Sharing Content with People+Content IP

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

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

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

Download and Install Polycom® People+Content™ Technology

Prior to sharing content from a computer, download and install the Polycom® People+Content™ technology onto the computer.

1. Go to the Polycom People+Content IP webpage.
2. Download the People+Content IP software for Mac or PC, as needed.
3. Open the zip file and click on the application installation executable.
4. Follow the instructions in the installation wizard.

Share Content using People+Content IP

After People+Content IP has been installed, content can be shared.

Windows: Navigate to **My Computer** and click the **People+Content IP** folder.

Macintosh: Navigate to **Finder** then search for and **Run** the **People+Content IP** application.

1. Enter the IP address or host name of the Polycom Trio system and the meeting password, if one is set.
2. Click **Connect**.
3. Open the content you want to share with others via Trio.
4. Click **Play ▶**.

Stop Sharing Content with People+Content IP

When you are done showing content, make sure to stop running the People+Content IP application.

1. Click **Stop** in the People+Content IP application.

Share Content with People+Content IP over USB

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

1. Connect a USB cable from the USB port on the Polycom Trio to the USB port on the 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:
Windows: Navigate to **My Computer** and click the *People+Content IP* folder.
Mac: Navigate to **Finder** then search for and **Run** the *People+Content IP* application.
3. Open the content to be shared.
4. Click **Play ▶**.

Share Content from Apple Devices

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

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

For more information on using AirPlay®, refer to the documentation for your Apple product.

Share content from Windows or Android Devices

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

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

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

Share Content with an HDMI or VGA Connection

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

1. Connect the device to the paired system with an HDMI or VGA cable
2. Do one of the following on the phone menu:

When Not on a call: Select **Content > Show Content**.

In a call: Select **Show Content**.

Connect Devices to Trio

Users can connect devices (laptop PCs, Tablets, Mobile Phones) to the Trio using a USB cable, Bluetooth, or Near Field Communication (NFC), where those features are included and enabled.

Bluetooth Connections

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. Users may also use the system to play audio from media, such as music or videos from your mobile phone or tablet.

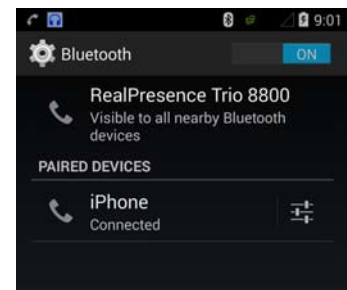
Make the System Visible to Nearby Bluetooth Devices

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

On the Home screen:

1. Tap Bluetooth.
2. Make sure **Visible to all nearby Bluetooth devices** is displayed below the system's name.
3. Tap on the system name if **Only visible to paired devices** is displayed.

The system is made visible to all nearby Bluetooth devices and the message updates.



Connect Using Bluetooth

If Bluetooth is enabled on the Trio, users can connect a Bluetooth-capable mobile phone or tablet to the system. The RealPresence Trio remembers up to 10 previously paired devices. Bluetooth connections cannot be made during an active call on the system. Bluetooth must be enabled on the device and the name of the Trio system must be selected when it is detected for the connection to work.

Connect Using Near Field Communication (NFC)

Connecting the mobile phone or tablet to the system with Bluetooth using NFC enables users to play the audio from calls or media, such as music or videos, on the system. Where Near Field Communication (NFC) is available and enabled on the Trio, connections via a Bluetooth-capable mobile phone or tablet that also uses NFC may be used.

1. Enable NFC for Bluetooth in the settings on the device (mobile/tablet).
2. Tap and hold the device for two seconds above the **NFC** symbol on the left side of the Trio.
3. Confirm that the device is paired and connected to the system and then begin using the connection.

Play Audio from a Bluetooth Device

The Trio can be used as a Bluetooth speaker for music or videos that are played on your mobile phone or tablet. On the device:

1. Connect the mobile phone or tablet with the system.
2. Choose the music or video you want to hear.
3. Select the Trio system when prompted to choose the audio device.
The audio plays through the system's speakers.

USB Cable Connections

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.

Connection Requirements

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


A laptop or mobile device may be connected to the system via a USB or Micro-USB cable. Simply connect the USB cable to your computer or device and to the USB port on the system. Ref: *RealPresence Trio Hardware Features* for the location of the USB port.

Set RealPresence Trio as Your Audio Device

In order to use the RealPresence Trio 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.

When your laptop is connected to the RealPresence Trio, 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.

1. In RealPresence Desktop, click **Settings**  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**.

Display 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. Preference settings may include Number Auto-Formatting, Ringtones, etc.

Password Requirements

Some features are defined in the Advanced settings menu. Those features require an administrator level password to access and modify. However, many features on the system can be enabled or customized from the Basic Settings menu. This area does not require a password unless the system administrator has enabled the requirement for a password to access the Basic Settings menu. In this instance any customizations will require the password or the permission of the system administrator and their assistance enabling or customizing the system's features.

Manage Language Display

The system supports several languages that may be selected for display. Check with your system administrator to find out which languages are supported.

1. Navigate to **Settings > Basic > Preferences > Language**.
2. From the **Language** screen, select a language.

The language on the system updates automatically.

Manage Time and Date Display

The time and date are displayed in the status bar section of the screen. When the system cannot obtain a time and date, the time and date display flashes. If this happens, or if the time and date are incorrect, contact your system administrator. The time and date formats may be customized in Settings where access is permitted.

Modify Time and Date Display

1. Navigate to **Settings > Basic > Preferences > Time & Date**.
2. Select one of the following options:
 - **Clock Date** to change the date format.
 - **Clock Time** to change the time format.
 - **Clock Order** to change the order of the time and date display.
3. Select the desired time / date format from the options presented.

Disable Time and Date Display

1. Navigate to **Settings > Basic > Preferences > Time & Date**.
2. Select **Disable** to immediately turn off the date/time display.

Manage Backlight Settings

The Backlight intensity settings may be modified to suit preferences. The system's backlight has the following components:

- **Backlight Intensity** – The brightness of the screen during system activity and inactivity including the following settings:
 - **Backlight On** – The brightness of the screen during any system activity.
 - **Backlight Idle** – The brightness of the screen when there is no system activity.
 - **Maximum Intensity** – The maximum brightness scale that applies to all other intensity settings. The Maximum Intensity setting modifies the entire backlight intensity scale for the other settings. If the Maximum Intensity setting is decreased, the levels for both the Backlight On and Backlight Idle intensity settings decrease as well.
- **Backlight Timeout** – The number of seconds the system is inactive before the backlight dims to its Backlight Idle intensity. The backlight timeout countdown period begins after the last key press or the last system event, such as an incoming call.

Modify the Backlight On Intensity

1. Navigate to **Settings > Basic > Backlight Intensity**
2. Tap the **Backlight On** option.
3. Choose the desired intensity setting. (The default **On** intensity is **High**)
4. Tap **Back** when finished to return and make changes to other Backlight settings, or *Exit*.

Modify the Backlight Maximum Intensity

While in the *Backlight Intensity* setting screen:

1. Tap the **Maximum Intensity** option.
2. Tap **Up** (increase) or **Down** (decrease), or drag your finger along the slider to increase or decrease the maximum intensity.
3. Tap **Back** when finished to return and make changes to other Backlight settings, or *Exit*.

Modify the Backlight Idle Intensity

While in the *Backlight Intensity* setting screen:

1. Tap **Backlight Idle**.
2. Choose the desired intensity setting. (The default *Idle* intensity setting is Low)
3. Tap **Back** when finished to return and make changes to other Backlight settings, or *Exit*.

Modify the Backlight Timeout Setting

1. Navigate to **Settings > Basic > Backlight Timeout**
2. Select the number of seconds the system is idle before the backlight dims. (The default is 40 seconds)
3. Tap **Back** when finished, or *Exit*.

Manage Power-Saving Mode

By default, the system turns off the screen to conserve energy after it has been idle for a pre-defined amount of time. Power-Saving Mode Timeout settings may be modified and/or configured to use different idle timeouts for office and off hours.

Modify Office Hours

The day/hour of the starting time and the duration of Office Hours may be defined for the system:

For Start Time:

1. Navigate to **Settings > Basic > Power Saving > Office Hours**
2. Tap the **Start Hour** option.
3. Select a day of the week.
4. Enter a start time using the 24-hour clock from 0 to 23.
5. Select **Save** and tap **Back** to make more changes, or *Exit*.

For Duration:

1. Navigate to **Settings > Basic > Power Saving > Office Hours**
2. Tap the **Duration** option.
3. Select a day of the week.
4. Enter a duration from 0 to 12 hours per day.
5. Select **Save**.


Modify Timeouts

The period of time the system is idle before the screen turns off may be defined. Different timeouts for office hours (*Office Hours Idle Timeout*) and non-office hours (*Off Hours Idle Timeout*) may be specified. By default, the Office Hours Idle Timeout is always longer than the Off Hours Idle Timeout. Also, the *User Input Idle Timeout* allows a separate timeout period to be applied after a key press or screen selection. This allows the user to set a higher User Input Idle Timeout than the Office Hours and Off Hours Idle Timeouts so that the power-saving mode doesn't initiate as often when actively using the system.

1. Navigate to **Settings > Basic > Power Saving > Timeouts**.
2. Select **Office Hours Idle Timeout**.
3. Enter the number 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.
4. Select **Off Hours Idle Timeout**.
5. 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.
6. Select **User Input Idle Timeout**.
7. Enter the number of minutes (from 1 to 10 minutes) the system should wait after a key press or screen select before starting power-saving mode.
8. Select **Save**.

Manage Ringtones

A simple way to customize the system is to change the ringtone for different call types. 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 for a single line:

1. Navigate to **Settings > Basic > Ring Type**.
2. When multiple lines are configured on the system, select a line.
3. Choose **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 **Back**  after the ringtone has been selected to make other changes, or tap *Exit*.

Manage Audio Play Settings

Users may choose to have audio play from the system's speakers, or from the monitor, or using external speakers connected to the RealPresence Trio Visual+. The system can also be set to automatically play audio from audio calls on the system and audio from video calls on the connected monitors or external speakers.

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.

Manage Number Formatting

By default, the system automatically formats phone numbers based on the amount of numbers entered. For example, the number 17135439078 is reformatted as +1 (713) 543-9078. This setting may be turned on or off, as preferred.

1. Navigate to **Settings > Preferences > Number Formatting**.
2. Tap to select **Enable** or **Disable**, as desired.

Call Lists and Directories

The Polycom Trio system supports a Recent Calls list, a Local Directory, and a Corporate Directory. Each implementation is different. Check with your system administrator to find out which features are available.

Note: The system can also support a Skype for Business Directory, depending on your server and whether those features have been enabled by your system administrator.

Recent Calls



The Recent Calls list on Polycom Trio includes lists for Missed, Received, and Placed calls. Each list holds up to 100 of the most recent entries.

The following management tasks may be performed within the Recent Calls list:

View Recent Calls

Tap **Recent Calls** to review the list of recent call entries.

Edit Caller Information

A Contact's phone number information may be modified while on hold before returning the call.

1. Tap the **Info** ⓘ icon next to a call entry.
2. Tap **Edit** ✎.
3. Edit the number and then tap **Dial** to return the call.

Save a Recent Call as a Contact

Save a contact to the Contact Directory.

1. Tap **Info** ⓘ next to a recent Call entry.
2. Tap the **Edit** ✎ icon and modify the contact information as needed.
3. Tap **Save** on the *Call Details* screen.

Delete a Recent Call Entry

Delete any call entry from the Recent Calls list. *Note:* Call entries deleted while using the Skype for Business client will update the changes on the system and in the Skype for Business client.

1. Tap **Info** ⓘ next to a call entry.
2. Tap **Delete Call** ✖.

Place a Call from Recent Calls

Place calls to contacts in the Recent Calls list, which displays calls that were recently placed, answered, or missed.

1. Tap **Recent Calls** (in Calls screen or Home screen)
2. Tap on a number in the list and the call is automatically placed.

Local Directory

Review, add, and manage contacts in the system's Local Directory, if the system administrator permits this access. The system administrator can set the Local Directory as read-only or require a password for access to the directory. Contact your organization's system administrator for assistance accessing or updating the Local Directory.

Search for a Local Directory Contact

Enter search criteria while in Local Directory to locate specific contacts.

1. Navigate to **Contacts > Local Directory**
2. Enter contact name, etc. in the **Search** field. Results update and display automatically.

View Contact Details

Tap on a **Contact** in the list to view the **Contact Details** screen, which displays the current name, number, and any additional information that may have been entered.


Add a Contact to Local Directory

New contacts added to a directory only require the contact number, but additional information can be entered, as desired.

While in the Local Directory:

1. Tap **Add +**
2. Enter the contact information in the available fields.
3. Tap **Save**.

Edit Local Directory Contact Information

1. Tap to select a Contact in the directory list.
2. Tap **Edit** 
3. Modify the current name, number, and any additional information that may have been entered, as needed.
4. Tap **Save**.

Delete a Local Directory Contact

1. Tap to select a Contact in the directory list.
2. Tap **Delete Contact** in the Details screen.
3. Tap **Yes** to confirm the action.

Favorites

Favorites are the contacts in your Local Directory that you want displayed on the Home Screen. Generally, because the numbers are called most often. Only three (3) Favorites display onscreen at a time, however, users can swipe the screen from right to left to display any additional Favorite contacts. Favorites also display at the top of the list of contacts in the Local Directory.

Add a Favorite

Users can add any contact in the Local Directory as a favorite which will then be displayed on the Home screen in the Favorite Contacts section.

1. Navigate to **Contacts > Local Directory**.
2. Tap to select a Contact in the list, or use the search feature to locate the listing.
3. Tap the **Info** icon to view the details.
4. Tap **Favorite** on the *Contact Details* screen. The selection is added to the list of Favorites.

Remove a Favorite

Users can remove a favorite contact to make room for a new favorite. When a contact is removed as a favorite, the contact is no longer displayed in the Favorite Contacts section of the Home screen.

1. Navigate to **Contacts > Local Directory**.
2. Tap on a contact.
3. Tap the **Info** icon to view contact details.
4. On the *Contact Details* screen, tap **Favorite**. When the icon turns white, it is removed as a favorite contact.

Corporate Directory

Note: Check with your system administrator to find out if this feature is available.

A system administrator can setup the phone so that the user can review a Corporate Directory, which lists contacts and groups within the organization. Users must have permission to update the Corporate Directory, and the system administrator determines which corporate contacts are visible. Note: Users may need to enter credentials to access the directory for the first time, if setup as a requirement by the system administrator.

Search the Corporate Directory

1. Navigate to **Contacts > Corporate Directory**.
2. Enter search criteria (name/number) in the **Search** field and select **Submit**.
3. Select a contact and select **View** to review the contact's information.

Perform an Advanced Search of the Corporate Directory

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

1. Navigate to **Contacts > Corporate Directory**.
2. Select **AdvFind**.
3. Enter the search criteria and select **Submit**.
4. Select a contact and tap **View** to review the contact's information.

Add Corporate Directory Contacts to the Local Directory

Users may be permitted to add Corporate Directory contacts to the Local Directory.

When a Corporate Directory contact is saved to the Local Directory, the first name, last name, and phone number of the contact are automatically saved to the directory. Additional contact information can be entered after the contact is saved to the local directory.

In the Corporate Directory:

1. Search for a contact.
2. Select the desired contact and tap View.
3. Tap Save in the Details view.
4. Enter any additional contact information in the Details view and tap **Save** again.

Calendar


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

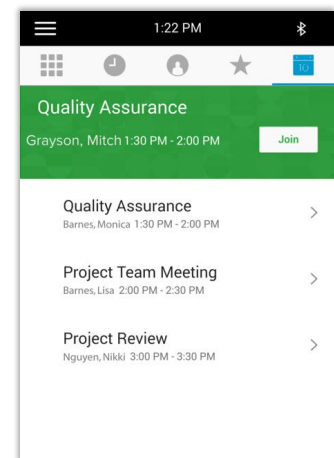
Open the Calendar

Users can access the calendar on Polycom Trio to view and join scheduled meetings. Users may review meetings for the current day and upcoming meetings. Meetings on previous days cannot be viewed from the Trio system.

Note: When logged in using the Skype for Business user account, the calendar feature provides access to view and join scheduled meetings on the Outlook calendar, as well.

On the Home screen:

1. Tap the Calendar  icon to display your scheduled meetings for the day.



View Meeting Details

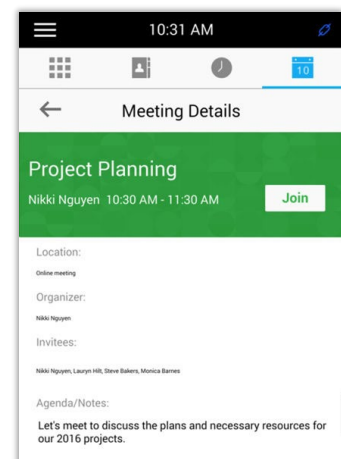
Users may tap to select a meeting in the calendar and review the start and end times, location, organizer, invitees, and meeting description.

Meeting Reminders

When logged into a *Skype for Business* or *Exchange Server* account, reminder notifications display for scheduled meetings on the calendar and an alert tone may sound at 5 minutes and 1 minute before the meeting time. Meeting reminders allow users to view meeting details and join the meeting.

Set Meeting Reminder Type

1. Navigate to **Settings > Basics > Preferences**.
2. Select **Calendar Settings > Reminder Settings**.
3. Tap to select one of the following meeting reminder types:
 - **Silent** – The meeting reminder displays without an alert tone.



- **Audible Once** – An alert tone plays the first time a meeting reminder displays, but does not display for any additional meeting reminders.
 - **Audible always** – (Default) An alert tone plays each time a meeting reminder displays.
4. Select **Back** ← to return to the calendar settings, or *Exit*.

Set Meeting Alert Tone

Define the alert tone that plays when meeting reminders display.

1. Navigate to **Settings > Basic > Preferences**.
2. Select **Calendar Settings > Alert Tone**.
3. Choose an alert tone from the options displayed.
4. Tap **Play** to hear the tone.
5. Select **Back** ← to return to Calendar settings or *Exit*.

Disable Meeting Reminders

Meeting reminders are enabled for all meetings by default, but may be disabled so they do not display.

1. Navigate to **Settings > Basics > Preferences**.
2. Select **Calendar Settings > Reminder Settings**.
3. Select **Reminder** and tap **Disable**.
4. Select **Back** ← to return to calendar settings, or *Exit*.

Join Calendar Meetings

A **Join** button is provided for meetings in the [Calendar](#) view, in the [Meeting Details](#) view, and within [Meeting Reminders](#) so that users may access any scheduled meeting quickly and easily.

Join Using an Alternate Number

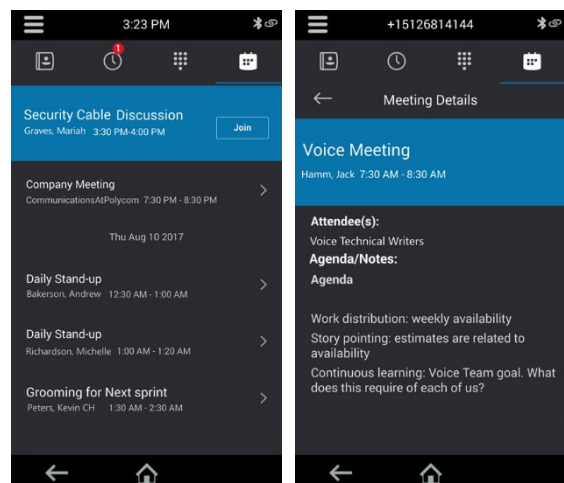
Any alternate numbers may be provided by the meeting organizer and can be used to join the meeting.

1. Tap **Join** in the *Calendar* view or within the *Meeting Reminder*.
2. Select **More Actions**.
3. Tap on the desired alternate number in the meeting details screen to select it as the Join option.

View a Different Exchange Calendar

If enabled by your system administrator, users logged into their *Skype for Business* account may access a Microsoft Outlook calendar that isn't associated with the user's Skype for business account. The Exchange User account information (user, domain, password) will be required to access the alternate calendar account.

1. Tap **Sign In**.
2. Tap **User Credentials**, if prompted.
3. Enter *your* Skype for Business login credentials, or the extension and PIN (as required).
4. Tap **Advanced**.



5. Enter the information for the alternate Exchange account in the following fields:
 - **Exchange User**
 - **Exchange Domain**
 - **Exchange Password**
6. Tap **OK**.
7. Tap **Sign In**.

The Exchange Service account's calendar information is uploaded and displays on the system in place of the Skype for Business account associated with the system. This process may take a few minutes to complete and display.

Supported USB Models

The following USB flash drive devices are supported¹ by Trio.

USB Device Manufacturer	USB Device Model	Vendor ID ²	Product ID ²
A-DATA	A-DATA My Flash 1GB	4871	355
Corsair	Corsair Flash Voyager 1 GB	1659	9495
DaneElec	DaneElec 2GB, 4GB	5118	7680
Dell	Dell 64MB	2284	18
Disney	Disney Mickey Mouse	4703	4132
	Disney Mickey and Pluto	4871	355
Emprex	Emprex 2GB	4871	355
EMTEC International	EMTEC 1.0GB	5118	7427
Future Shop	Geek Squad 4GB	2284	32
Kingston	Kingston Data Traveler 128 MB	1256	256
	Kingston Data Traveler 256 MB	2284	8
	Kingston Data Traveler 256 MB	3190	5
	Kingston Data Traveler 256 MB, 1 GB	2284	22
	Kingston Data Traveler 1GB	2385	5637
	Kingston Data Traveler 2GB	5118	6656
	Kingston Data Traveler 4GB	5118	7424
Memorex	Memorex TravelDrive Mini 512MB, 2GB	2284	22
	Memorex TravelDrive 512MB, 1GB, 4GB	4855	7715
Patriot	Patriot 1GB, 2GB	5118	6656, 7424, 7680
	Patriot XT Xporter XT 16GB	5118	7680
PNY	PNY Optima Attache 2GB	5118	7680
	PNY Mini Attache 2GB	2352	25924
	PNY Optima Pro Attache 8GB	5451	21
PQI	PQI 1GB, 2GB	13624	84
ORBYX Electronics	Centrios 1GB, 2GB, 4GB	5118	7459, 7971
	Centrios 1GB, 2GB	4871	355
	Nexxtech 1GB	5118	7459
	Nexxtech 2GB	4871	355
OCZ Technology	Rally 2GB	4871	355
SanDisk	SanDisk Cruzer Mini 512MB	1921	20816
	SanDisk Cruzer Titanium 1GB	1921	21512
	SanDisk Cruzer Micro 2GB, 4GB	1921	20817
	SanDisk Cruzer 2GB, 4GB	1921	21510
	SanDisk Cruzer Titanium 2GB	1921	20992
Sony	Sony USM128A —128MB	1356	139
	Sony MicroVault 1GB	1356	579
Transcend	Transcend 2GB	4871	355
ValGear	VGI 1GB	4719	355
	GXT Mobile Disk 8GB	4719	355
Verbatim	Verbatim 2GB	2284	32

¹ USB Flash drives over 2GB were not supported before SIP 3.1. | ² Some brands of USB flash drives have the same Vendor ID/Product ID.

Accessibility Features

The following table lists the accessibility features on the RealPresence Trio Solutions:

Accessibility Feature	Description
Visual Message Indicators	Icons on the user screen indicate when the system has new messages.
Adjustable Ring Tone / Volume	Choose from a variety of ring tones for the system, (see Set a Ringtone for Incoming Calls)
Adjustable Call Volume	Raise or lower the volume of the speaker to enhance or diminish voice or other system sounds you hear from the speakers.
Visual Notifications	Indicators on the screen (like flashing bars or icons) let users know when calls are incoming, outgoing, active, or held. Additional indicators identify system status and feature usage.
TTY Support	The system provides acoustic coupled TTY support and commercial TTY devices, such as Ultratec Superprint.
Adjustable Backlight Settings	Manage the brightness of the screen by adjusting intensity settings.
Plastic Overlay	A plastic overlay is available for placement over the touchscreen to assist users in locating the volume keys.
Auto-Answer Feature	The system can be setup to auto-answer calls.
Touchscreen	A large touchscreen allows users to select, swipe, and press to perform system functions and active features.
Built-in Speakerphone	A built-in speakerphone makes it possible to use the system without the need for a handset or headset.

System Maintenance

When the system is unable to operate properly, users will be asked to perform maintenance, or investigate or troubleshoot issues. This section offers tips and help for these tasks.

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.

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

The *Warnings* screen displays a list of any issues.

Restart the System

The 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* below.

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

A confirmation message displays.

2. Select **Yes**.

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

Update the System Configuration

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

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

A confirmation message displays.

2. Select **Yes**.

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

Test System Hardware

The 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.

1. Navigate to **Settings > Status > Diagnostics > Test Hardware**.
2. Select one of the following options and follow the prompts:
 - **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 cleaning the screen, disable it so you don't activate system functions while you wipe the touchscreen.

1. Navigate to **Settings > Basic > Screen Clean**.
2. Wipe the screen with a clean and dry microfiber cloth.
3. Tap the screen to enable the touchscreen again.



*Note: If the screen is still dirty after cleaning, dampen a soft, lint-free cloth with an isopropyl alcohol and water solution of 50:50, 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 and cause staining. **Never use chemicals or cleaning solutions to clean the touchscreen.***

Troubleshooting Tips

Check RealPresence Trio Visual+ Status

If the local or far-end's video stream or content is not displaying on the monitor, 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. Navigate to **Settings > Status > Networked Devices**.
2. Make sure that the Paired Device is **Connected**.
3. If the paired device is not connected, contact your system administrator.

Check Calendar Status

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. Ensure the **Status** field displays [Connected to server](#).

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 the following actions:

- Make sure your device is on the same network and WiFi 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 the following actions:

- Ensure the RealPresence Trio Visual+ is paired and connected with the RealPresence Trio (Ref. section [Check RealPresence Trio Visual+ Status](#)).
- Disconnect the USB camera from the RealPresence Trio Visual+ and then reconnect the camera.
- Make sure the USB camera is a supported camera (Logitech Webcam C930e recommended).
- Contact your system administrator for additional help.

Customer Support

A team of expert support professionals are here to assist with technical issues, questions related to billing, feature usage, service upgrades, as well as any other general inquiries you may have. Simply contact us and a representative will help you with your request.

In order to provide *optimal* support, we recommend that the account owner (or an Authorized Contact) submit a ticket online or contact us via our toll-free support number regarding any critical or timely issues that may require troubleshooting. And always keep your account number handy to help us better assist you when you need us.

Support by Phone - MAIN LINE: 1-888-538-3960

Live phone support is available 24/7 for emergency assistance.

Online Support: www.GoMomentum.com/Support

Send non-emergency support requests via the dedicated online portal as email-to-case.

Learning Resources: www.GoMomentum.com/MU

Momentum University is an online knowledge base of training and support content on the Momentum Telecom website. The Momentum University library is easy to use and offers the latest information about Momentum's best-in-class cloud services, devices, and features. Momentum University includes product guides, user guides, FAQs, videos, and quick reference tools to help you do what you do.

