

**User Guide** 

# Polycom® CX500/CX600/CX3000 IP Phone

Microsoft® Lync™Phone Edition



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## **Contents**

Use the Polycom CX500/600/3000 IP Phones Lync Phone Edition 4
Sign Into Your Phone
Sign In Using Microsoft Lync
Sign In Using a PIN
Make a Call 6
Use Call Controls
Manage Incoming Calls
Manage Multiple Calls
Initiate a Conference Call
Transfer a Call
View a Contact Card 14
Change Your Status
View Call Logs
Check Voice Mail
Join a Meeting from the Calendar
Access Phone Settings and Help18
Reset Your Phone
Safety Notices

## Use the Polycom CX500/600/3000 IP Phones Lync Phone Edition

The Polycom® CX500/600/3000 IP phones Microsoft® Lync™Phone Edition use Voice over Internet Protocol (VoIP) technology to provide many features not available on a traditional phone. For example, you can view call logs, join meetings, and change your status on your phone.

This guide explains how to use the Lync Phone Edition with the following phones:

- CX500 IP Phone
  - For more information, see the CX500 Support Page on Polycom Voice Support
- CX600 IP Phone
  - For more information, see the CX600 Support Page on Polycom Voice Support
- CX3000 IP Conference Phone
  - For more information, see the CX3000 Support Page on Polycom Voice Support

The following sections discuss how to use the CX500/600/3000 IP phones:

- Sign Into Your Phone
- Make a Call
- Use Call Controls
- Manage Incoming Calls
- Manage Multiple Calls
- Initiate a Conference Call
- Transfer a Call
- View a Contact Card
- Change Your Status
- View Call Logs
- Check Voice Mail
- Join a Meeting from the Calendar
- Access Phone Settings and Help
- Reset Your Phone

## Sign Into Your Phone

Make sure Lync is installed on your computer to simplify the phone's sign-in process and to make and receive calls from your computer when connected to your phone using a USB cable. For more information on the Lync sign-in process, see the section Sign In Using Microsoft Lync.

If you do not have Lync installed on your computer, you can sign in to your phone using a personal identification number (PIN). Note that you will have limited access to certain features, such as voice mail, calendar, and call logs, as well as reduced functionality when you sign in using a PIN. For more information on the PIN sign-in process, see the section Sign In Using a PIN.

#### **Sign In Using Microsoft Lync**

If Lync is installed on your computer, you can connect your phone to your computer and sign in on your phone using Lync.

#### To sign in using Microsoft Lync:

1 Connect your phone to your computer using the USB cable.

The following figure shows the Desk Phone Setup screen that displays on your phone at startup and shows how to connect your phone to your computer.



2 Sign in to Lync client on your computer.

If you use Lync with Office 365, type in your user name as username@domain.com (for example, bobk@contoso.com). If not, type your user name as domain\username (for example, contoso\bobk).

The sign-in process starts, and the following screen displays on your phone.





#### Set your Lync Edition Phone as your primary audio device in Lync client

If you have configured Lync to use another audio device as your primary audio device, for example a headset, you need to change the selected device in Lync. In Lync client on your computer, click **Options > Tools > Audio Device Settings**, and select **Lync Phone Edition** as your audio device.

#### Sign In Using a PIN

If Lync is not installed on your computer, you can create a PIN and sign in to your phone.

#### To sign in on your phone using a PIN:

1 On the Welcome screen, select No if you do not have the phone connected to a computer



2 Enter your phone number or extension, and select **Done**, as shown next.



### Make a Call

In addition to the standard way of making a phone call (by picking up the handset and dialing a number), you can make calls in the following ways:

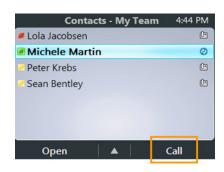
- Call from the Contacts screen on your phone
- Call by searching for a contact using the keypad
- Call from Microsoft Lync on your computer

#### To call from the Contacts screen on your phone:

1 From your phone's Home screen, select the **Contacts** icon.



- 2 From the Contact Groups screen, select the group of your contact.
- 3 Use the up and down arrow keys on the phone to select the contact, and select Call.



#### To call by searching for a contact using the keypad:

1 Press the numbers on the phone keypad that correspond to the contact name or the phone extension.

For example, to find 'Tony Smith,' begin pressing 8669\*76484, where '\*' is the space between the first and last name.

2 When you find the contact you want to call, select Call.

#### To call from Microsoft Lync on your computer:

1 In the Lync client, click **Group**, and click the group of the contact.



2 Click the Call button next to the contact you want to call.



Make sure your phone is connected to your computer when trying to make calls from Lync.

#### **Use Call Controls**

You can control call functions on your phone using the speakerphone, headset, mute, or volume keys. Note that some of the buttons and features described in this section may not apply to your phone.

Use the buttons on the phone console to do the following:

- To enable or disable the speakerphone during calls, press (1).

  If you adjust the speakerphone volume during a call, the volume setting is retained for all subsequent calls that use the speakerphone.
- To adjust the volume of the handset, speakerphone, headset speaker, and ringer if not in a call, press
- To mute local audio during calls so that others cannot hear you, press .



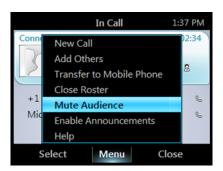
#### Connect your phone to your computer to receive audio

You must have your phone connected to your computer to receive audio through the handset, headset, or speakerphone.

You can also mute the audio from participants in a conference call on your phone.

#### To mute the audio of participants in a conference call:

» From the In Call screen, select Menu > Mute Audience.



## **Manage Incoming Calls**

When you receive an incoming call, you can either answer the call or redirect the call to your voice mail.

#### To manage an incoming call:

- » From the **Incoming call** screen, do one of the following:
  - > To answer the call, select **Answer** or pick up the handset.
  - > To send the caller directly to your voice mail, select **To Voice Mail**.

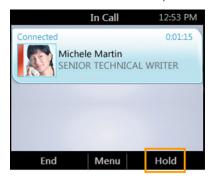


## Manage Multiple Calls

When you're in a call, you'll see several call controls that you can use to manage multiple calls.

#### To place a call on hold:

» From the In Call screen, select Hold, as shown next.





#### Microsoft Lync CU 7 update required for Music on Hold

Your phone requires the Microsoft Lync CU7 update to support the Music on Hold feature. Contact your Lync administrator to enable this option. (The administrator will need to apply the following command to the Lync server: set-CsClientPolicy -identity Global -EnableClientMusicOnHold \$true).

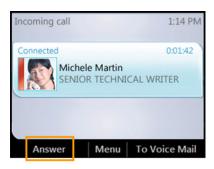
Once enabled, you will see that option enabled on the Lync client.

When you put a call on hold, the other end will hear the configured music. You can change the music they hear using the Lync client.

For more information, see the forum Music on Hold (MoH) Lync Phone Edition on Lync TechCenter Forums.

#### To answer an incoming when you're in an active call:

» From the Incoming call screen, select Answer, as shown next. Your active call is placed on hold and your second call is answered.



#### To switch between calls:

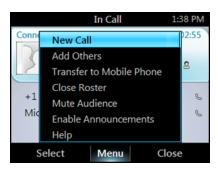
1 Press the **Home** button on the phone, and select **Active Call**.

2 From the **In Call** screen, use the up and down arrow keys to select the call that you want to activate, and select **Resume**.



#### To make a new call and place the active call on hold:

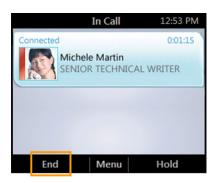
1 From the In Call screen, select Menu > New Call. Your active call is placed on hold.



2 Enter a phone number or select a contact, and select Call.

#### To end a call:

» From the In Call screen, select End.



#### **Initiate a Conference Call**

You can initiate a conference call during an active call by adding participants to the call.

#### To initiate a conference call:

1 From the In Call screen, select Menu > Add Others, as shown next.



2 Enter a phone number or select a contact, and select Add.

To add more participants, repeat this procedure.

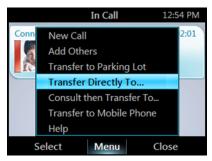
#### **Transfer a Call**

You can transfer calls in the following ways:

- Transfer Directly To Transfers the call directly to a contact without speaking with the contact first.
- Consult then Transfer To Transfers the call after you speak with the contact first.
- Transfer to Mobile Phone Transfers the call to your mobile phone.

#### To transfer a call directly to a contact:

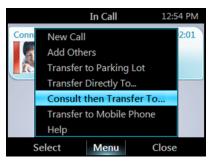
1 From the In Call screen, select Menu >Transfer Directly To.



2 Enter a number or select a contact, and select Call.

#### To consult with a contact before transferring a call:

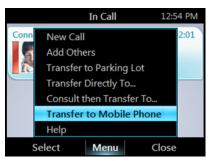
1 From the In Call screen, select Menu > Consult then Transfer To.



- 2 Enter a number or select a contact and select Call.
- 3 After you speak with the person you're transferring the call to, select Complete Transfer.

#### To transfer a call to a mobile phone:

» From the In Call screen, select Menu, and then select Transfer to Mobile Phone.



You can also transfer calls to a parking lot that places the call on hold on the Lync server. Calls transferred to the parking lot are given a retrieval number that any contact can use to retrieve the call from the parking lot. Transferring calls to the parking lot enables you to remove the call from your line so you can make additional calls or resume a held call.

#### To transfer a call to a Parking Lot:

1 From the In Call screen, select Menu > Transfer to Parking Lot.



The In Call screen displays and the call is given a number to retrieve the call, as shown next.



2 Provide a contact with the retrieval number for the parked call. For example, if Sarah needs to retrieve the parked call, instant message Sarah with the **344** retrieval number for the call.

#### **View a Contact Card**

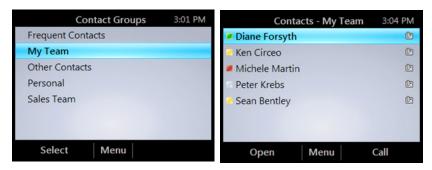
A contact card provides details about a contact's availability and presence. Depending on the access level that a contact grants you, you may see the contact's phone numbers, schedule information, the phone number of the most recent call, and a personal note if the contact has written one.

#### To view a contact card:

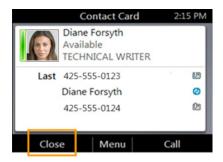
1 From your phone's Home screen, select the **Contacts** icon.



2 From the Contact Groups screen, select the group your contact is in, and select a contact name.



3 When you finish viewing the contact card, select Close.



## **Change Your Status**

Your presence status is determined by your calendar and activity. For example, when you're in a scheduled meeting or on a call, your status shows as Busy. If you don't use your computer for a certain period of time (as determined by the Status options in Lync), your status changes to **Away**. You can also change your status manually.

The same status displays in Lync on your computer and in Lync Phone Edition on your phone, and you can change your status from either place.

#### To change your status:

1 From your phone's Home screen, select Menu, and then select My Status.
The check mark indicates your current status.

2 On the My Status screen, do one of the following:



- > If you don't want to any interruptions, select **Do Not Disturb**.
- > If you want others to feel free to contact you, select **Available**.
- > If you want to let others know you're in a meeting, on a call, or otherwise engaged, select **Busy**.
- If you're stepping away just for a few moments, select **Be Right Back**.
- If you want it to look like you're unavailable, select Away.
- > If you want Lync reset your status based on your calendar and activity, select **Reset Status**.

## **View Call Logs**

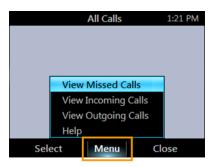
The Call Logs screen displays a history of incoming, outgoing, and missed calls.

#### To view your call logs:

1 From your phone's Home Screen, select the Call Logs icon.



2 From the **All Calls** screen, select **Menu** and select the call log you want to view. For example, select View Missed Calls, as shown next.



#### **Check Voice Mail**

If your organization has enabled voice mail, you can access your voice mail to check messages or to change your voice mail greeting. If you have unheard messages, the **Voice Mail** icon displays a number indicating how many messages you have.

#### To check your voicemail:

1 From your phone's Home screen, select the Voicemail icon. You can also press and hold the 1 key to access your voice mail.



The Voice Mail screen displays the phone number, message date, and time of the call. For contacts listed in your personal contacts or corporate directory, the name and contact card of the sender also displays.

2 Select a contact and select Play.

## Join a Meeting from the Calendar

You can view your Microsoft® Outlook® calendar and appointments on your phone and join meetings directly from appointments listed on your calendar.



#### Joining Lync meetings on your phone

You can only join Lync online meetings that have been created using the Online Meeting Add-In for Lync.

#### To join a meeting:

1 From your phone's Home Screen, select the **Calendar** icon.



2 From the Today's Calendar screen, select a meeting, and select Join, as shown next.



## **Access Phone Settings and Help**

You can access a Help menu and configure the following settings on your phone:

- Volume
- Brightness
- Logging
- Desk Phone Location
- Make Test Call
- Ring Tones
- Phone-Unlock PIN
- Time Zone
- Date Format
- Time Format
- Language
- High Contrast
- Text Telephony (TTY)
- Malicious Call Trace

Note that some of these options may not be available on your phone.

#### To access the Settings menu:

1 From your phone's Home screen, select **Menu > Settings**.



2 From the **Settings** screen, select the setting you want to change.

#### To access the general Help for the phone:

» From your phone's Home screen, select **Menu > Help**.



You can also access context-sensitive help from other screens on your phone.

#### To access context-sensitive Help for a specific screen:

» From your current screen, select Menu > Help.

#### **Reset Your Phone**

If your phone stops working, your system administrator may ask you to reset your phone.

#### To reset your phone:

- 1 Press and hold the \* and # keys while you disconnect your phone's power supply.
- 2 Reconnect the phone's power supply.
  - A message displays asking if you want to continue. Select Yes.

The reset process can take up to four minutes. After the phone resets, the Home screen displays.

## **Safety Notices**

#### Service Agreements

Please contact your Polycom Authorized Reseller for information about service agreements applicable to your product.

#### **Governing Law**

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Polycom's sole obligation under this express warranty is at Polycom's option and expense, to repair the defective product or part, deliver to Customer an equivalent product or part to replace the defective item, or if neither of the two foregoing options are reasonably available, Polycom may, on its sole discretion, refund to Customer the purchase price paid for the defective product. All products that are replaced will become the property of Polycom. Replacement products or parts may be new or reconditioned.

Polycom is expected to warrant any replaced or repaired product or part for ninety (90) days from shipment, or the remainder of the initial warranty period, whichever is longer. Products returned to Polycom must be sent prepaid and packaged appropriately for safe shipment, and it is recommended that they be insured or sent by a method that provides for tracking of the package. Responsibility for loss or damage does not transfer to Polycom until the returned item is received by Polycom. The repaired or replaced item will be shipped to Customer, at Polycom's expense, not later than thirty (30) days after Polycom receives the defective product, and Polycom will retain risk of loss or damage until the item is delivered to Customer.

#### **Exclusions**

Polycom will not be liable under this limited warranty if its testing and examination disclose that the alleged defect or malfunction in the product does not exist or results from:

- Failure to follow Polycom's installation, operation, or maintenance instructions.
- Unauthorized product modification or alteration.
- Unauthorized use of common carrier communication services accessed through the product.
- · Abuse, misuse, negligent acts or omissions of Customer and persons under Customer's control; or
- · Acts of third parties, acts of God, accident, fire, lightening, power surges or outages, or other hazards.

#### **Warranty Exclusive**

IF A POLYCOM PRODUCT DOES NOT OPERATE AS WARRANTED ABOVE, CUSTOMER'S SOLE REMEDY FOR BREACH OF THAT WARRANTY SHALL BE REPAIR, REPLACEMENT, OR REFUND OF THE PURCHASE PRICE PAID, AT POLYCOM'S OPTION. TO THE FULL EXTENT ALLOWED BY LAW, THE FOREGOING WARRANTIES AND REMEDIES ARE EXCLUSIVE AND ARE IN LIEU OF ALL OTHER WARRANTIES, TERMS, OR CONDITIONS, EXPRESS OR IMPLIED, EITHER IN FACT OR BY OPERATION OF LAW, STATUTORY OR OTHERWISE, INCLUDING WARRANTIES, TERMS, OR CONDITIONS OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, SATISFACTORY QUALITY, CORRESPONDENCE WITH DESCRIPTION, AND NON-INFRINGEMENT, ALL OF WHICH ARE EXPRESSLY DISCLAIMED. POLYCOM NEITHER ASSUMES NOR AUTHORIZES ANY OTHER PERSON TO ASSUME FOR IT ANY OTHER LIABILITY IN CONNECTION WITH THE SALE, INSTALLATION, MAINTENANCE OR USE OF ITS PRODUCTS.

#### Safety and Compliance

#### Part 15 FCC Rules

This device is compliant with Part 15 of the FCC Rules. Operation is subject to the following two conditions:

- 1 This device may not cause harmful interference, and
- 2 This device must accept any interferences received, including interference that may cause undesired operation.

#### **Class B Digital Device or Peripheral**

Note: This equipment is tested and complies with the limits for a Class B digital device, pursuant to Part 15 of the FCC Rules. These limits are designed to provide reasonable protection against harmful interference in a residential installation. This equipment generates, uses, and can radiate radio frequency energy and, if not installed and used in accordance with the instructions, may cause harmful interference to radio communications. However, there is no guarantee that interference will not occur in a particular installation. If this equipment does cause harmful interference to radio or television reception, which can be determined by turning the equipment off and on, the user is encouraged to try to correct the interference by one or more of the following measures:

- **1** Reorient or relocate the receiving antenna.
- 2 Increase the separation between the equipment and receiver.
- 3 Connect the equipment into an outlet on a circuit different from that to which the receiver is connected.
- 4 Consult the dealer or an experienced radio/TV technician for help.

#### **Modifications**

In accordance with Part 15 of the FCC Rules, the user is cautioned that any changes or modifications not expressly approved by Polycom, Inc. could void the user's authority to operate the equipment. This equipment may not be used on a coin service or party line.

#### **Installation Instructions**

Installation must be performed in accordance with all relevant national wiring rules.

L'Installation doit être exécutée conformément à tous les règlements nationaux applicable au filage électrique.

When using Power over Ethernet (PoE), the equipment is to be connected only to PoE networks without connections to the outside plant.

#### Plugs Acts as Disconnect Device

The socket outlet to which this apparatus is connected must be installed near the equipment and must always be readily accessible.

La prise électrique à laquelle l'appareil est branché doit être installée près de l'équipement et doit toujours être facilement accessible.

#### **Industry Canada (IC)**

This Class [B] digital apparatus complies with Canadian ICES-003.

Cet appareil numérique de la classe [B] est conforme à la norme NMB-003 du Canada.

#### **CE and VCCI Mark**

This Polycom CX500/600/3000 IP phones are marked with the CE mark. This mark indicates compliance with EC Directives 2006/95/EC and 2004/108/EC. A full copy of the Declaration of Conformity can be obtained from Polycom Ltd., 270 Bath Road, Slough, Berkshire, SL1 4DX, UK.

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#### Safety and Compliance (continued)

#### **WARNING Electrical Safety**

To avoid electric shock, do not connect safety extra low voltage (SELV) circuits to teleconference station network (TNV) circuits. LAN ports contain SELV circuit, and WAN ports contain TNV circuits. Some LAN and WAN ports both use RJ-45 connectors.

The Polycom CX500 and Polycom CX600 products are rated 24Vdc, 0.5A. When used with the optional external power supply, the power supply shall be a Listed power supply with a LPS output, rated 24V, min. 0.5A.

The Polycom CX3000 product is rated 48Vdc. 0.375A. When used with the optional external power supply, the power supply shall be a Listed power supply with a LPS output, rated 48V, min. 0.375A.

#### **New Zealand Telepermit**

Polycom CX500 VoIP Telephone PTC 220/10/047

Polycom CX600 VoIP Telephone PTC 220/10/048

Polycom CX3000 VoIP Telephone PTC 220/10/049

#### **PTC General Warning**

The grant of a Telepermit for any item of terminal equipment indicates only that Telecom has accepted that the item complies with minimum conditions for connection to its network. It indicates no endorsement of the product by Telecom, nor does it provide any sort of warranty. Above all, it provides no assurance that any item will work correctly in all respects with another item of Telepermitted equipment of a different make or model, nor does it imply that any product is compatible with all of Telecom's network services.

## **Brazil Russian Compliance** Complies with GOST: Complies with ANATEL:

#### South Korea

Complies with KCC:







#### UAE

Complies with TRA

.МЛ05

TRA
REGISTERED No: ER0045567 / 10 DEALER No: 0017133 / 09

TRA REGISTERED No: ER0045566 / 10 DEALER No: 0017133 / 09

REGISTERED No: ER0045565 / 10 DEALER No: 0017133 / 09

#### Saudi Arabia

Complies with CITC

#### South Africa

Complies with ICASA