Using Polycom® VVX® Phones in a Microsoft® Lync™ Environment

Quick User Guide

This Quick User Guide is for VVX® 300, 310, 400, 410, 500, 600, and 1500 phones running Polycom® UC software 5.x.x or later.

Screen display is product-dependent and may differ from those shown in this guide. Contact your system administrator for more information. To learn more about features available on Polycom phones, consult your phone's Quick User Guide and User Guide available on the Polycom Support site.

We are striving to improve the quality of our documentation, and we appreciate your feedback. Email your comments to VoiceDocumentationFeedback@polycom.com.

Visit Polycom Support for software downloads, product documents, product licenses, troubleshooting tips, service requests, and more.

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About Your Phone

This guide provides information on how your phone functions when registered with Microsoft Lync Server. You can find other VVX phone features in your phone's User Guide on the Business Media Phones page on the Polycom Voice Support site.

Web Info: Using Lync Features on Polycom Phones
For more information on Lync features available on the VVX phones, refer to *Feature Profile 84538*.

Phone Features

Microsoft Lync enables you to use all the Polycom UC software features and presence statuses when you sign in to your Lync-enabled phone with your login credentials or PIN authentication.

After you sign into Lync on your phone, you can:

- Answer, place, and end calls
- Hold and resume calls
- Transfer calls
- Forward incoming calls
- Set your presence status
- Manage your Lync contacts
- Park and retrieve active calls
- Assign delegates to your line
- Connect your phone to your computer

For more information on available Lync features on Polycom phones, see Feature Profile 84538.

Tip: The *More* Soft Key
Depending on your phone's configuration, additional soft keys can be located beneath the **More** soft key.

Note: Lync-hosted Conference Calls Are Not Supported
You cannot initiate, split, or end a Lync-hosted conference call on your Polycom phone.

Sign into Microsoft Lync

Signing in to Lync on your phone enables you to view and place calls to your Lync contacts. The Lync Sign-In screen displays the first time your phone connects to the network. Subsequently, you can access the Sign-In and Sign-Out screens in the following ways:

To sign into Lync:

1 Press the **SignIn** or **SignOut** soft key or select **Settings > Features > Microsoft Lync > SignIn** or **SignOut**. The sign-in screen displays.

2 Complete the required sign-in fields with your login credentials or PIN authentication. Your system administrator provides you with your login credentials or PIN authentication.

3 Press the **SignIn** soft key. Your line shows as registered.

You can now add Lync contacts and see their presence status on your phone (see Update Your Microsoft Lync Contacts).

Troubleshooting: I Can't Sign-In Using My Login Credentials
If you cannot access your Lync contacts, or you lock your account, see your system administrator.

Tip: Using Strong Passwords
Follow your organization's password policy when entering a password for your sign-in credentials.

To sign out of Lync:

» Press the **SignOut** soft key.

After you sign out, your line shows as unregistered, your presence status is offline, your call lists are deleted, and you are unable to contact any of your Lync contacts using your phone.

Update Your Microsoft Lync Contacts

You can add, delete, monitor, and call contacts from your Lync contact list. When you delete a Lync contact from your phone, you remove the contact from your Lync account as well. The following figure shows a home screen displaying Lync contacts with presence information.

Home Screen on VVX phones
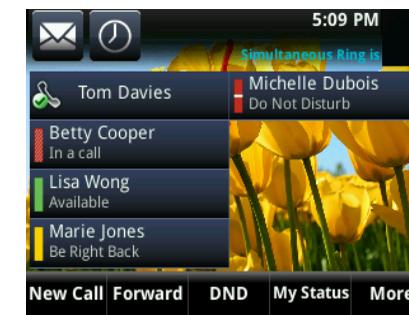
Tip: Lync Contacts on the Home Screen
If you want Lync contacts to display on your phone's Home screen, pin them as Frequent Contacts or Favorites in your Lync client on your computer. You can access all your Lync contacts from your phone by pressing the **Contacts** soft key.

You can add multiple Lync contacts up to the maximum number of contacts for your phone. The following table shows the maximum number of contacts permitted.

Maximum Number of Contacts Permitted

Phones	Number of Contacts
VVX phones	200
All other phones	100

You can also view your Lync groups on your phone. You cannot create new groups, delete existing groups, or move contacts between groups on your phone. You can only edit groups in your Lync client on your computer.

The following figure displays Lync groups on your VVX phone.

Lync Groups on VVX phones

Add Contacts to Lync Contact List

You can manually add contacts to your phone's Lync contact list.

To add a Lync contact on your phone:

1 Select the **Contacts** soft key or select **Settings > Features > Presence > Contacts** and select **Add**.

2 Enter the contact's email address and press the **Submit** or **Select** soft key. The following figure shows a Lync contact list.

Updating Your Microsoft Lync Presence Status

Your presence status information displays your availability, activity, and location to other Microsoft Lync contacts. The table Presence Icons on VVX Phones shows the Microsoft Lync presence icons that display on Polycom VVX 400, 500, 600, and 1500 phones. The table Presence Icons on VVX 300 Phones shows presence icons that display on VVX 300 phones.

Presence Icons on VVX Phones

Icons	Description
	Available
	Busy, In a Call, In a Meeting, In a Conference Call
	Away, Be Right Back, Inactive, Off Work
	Do Not Disturb, Presenting, In Presentation
	Offline
	Unknown
	Blocked

Presence Icons on VVX 300 Phones

Icons	Description
	Available
	Busy, In a Call, In a Meeting, In a Conference Call
	Away, Be Right Back, Inactive, Off Work
	Do Not Disturb, Presenting, In Presentation
	Offline
	Unknown
	Blocked

To change your presence status:

» Press the **My Status** soft key, or press **Settings > Features > Presence > My Status** and select your desired status.

Your new status displays to everyone in your contact list on your phone and your Lync client.

You can change your status to Available from any other status by selecting **Reset**.

Place Calls

You can place a call by using the handset, the speakerphone, a headset, a line key, or your Microsoft Lync contact list.

To place a call:

1 Pick up your handset or press the headset 🎧 or speakerphone 🔊 keys.

2 Select a contact to call.

The following figure shows the screen of a call placed to a Lync contact on VVX phones.

Placing a Call on VVX on 500

Tip: Calling Federated Contacts
You can use the SIP URI option to place calls to other companies or remote contacts. For more information, see the appropriate user guide for your phone on the Polycom Voice Support site.

Note: Video Calls on VVX Phones
You can make video calls between VVX 500, 600, and 1500 phones with VVX cameras, make calls between VVX camera-enabled phones and supported Polycom video endpoints or Microsoft Lync clients, and use VVX camera-enabled phones with a Polycom video bridge.

If your system administrator has given you a private number, you can give this number to others to contact you directly.

Answer Calls

When you answer an incoming call, the call becomes active. All incoming calls display on your phone's screen, as shown next.

Incoming Call on VVX 400

To answer an incoming call:

» Lift the handset, press 🔊, or press 🎧.

When you receive another call during an active call, a beeping tone indicates that a call is waiting.

To answer an incoming call while in an active call:

» Press the appropriate soft key to **Answer**, **Reject**, or **Ignore** the call.

Forward Calls

You can forward your phone's incoming calls to another Lync contact or to your voicemail.

To forward calls to a contact:

1 Select Forward.

2 Select Forward to a Contact.

3 Enter the user name or number of your Lync contact. A scrolling message showing that you have forwarded all incoming calls to your contact displays on your phone.

To forward calls to voicemail:

1 Select Forward.

2 Select Forward to Voicemail.
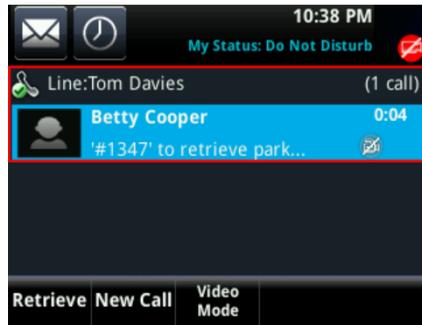
Park and Retrieve Calls

You can park up to eight active phone calls on your Polycom phone and retrieve parked calls from any Lync-compatible Polycom phone.

To park an active call:

» Press the **Park** soft key.

When you press the Park soft key, the call is parked in the call orbit and given an orbit number, as shown next.

Parked Call Orbit on VVX 500

To retrieve a parked call:

» Press **Retrieve**, or press **New Call** and dial the call's orbit number.

Anyone can retrieve a parked call on a Lync-compatible phone. For example, if you park a call at orbit '#1342', your coworker can dial '#1342' to retrieve the call.

> **Note: Parked Call Ring Back Time Limit**
> If a parked call is not retrieved by the set ring back time limit, the call is returned to your phone. The ring back time limit is set by your system administrator.

Assign Delegates with the Shared Line Appearance Feature

The Lync Shared Line Appearance (SLA), or Boss-Admin, feature enables you to assign delegates, set distinct ringtones, and interact with assigned lines. Delegates can place, answer, hold, or transfer calls on behalf of the boss's line.

To assign delegates:

1 In your Lync client, click ⚙ and select **Tools > Options > Call Forwarding**.

2 Select **Simultaneous ring > My Delegates** and add contacts as delegates for your line. Simultaneous ringing is automatically enabled for all assigned delegates.

> **Settings: Maximum Boss and Delegate Lines**
> Boss phones can have up to 25 delegates. As a delegate, you can only view as many bosses as you have line keys on your phone. If all available line keys have been filled with boss contacts, additional contacts are not shown on the delegate's phone.

Answer and Hold Incoming Calls

The SLA feature enables you to view activity on delegate and boss's lines. Delegates can answer, hold, forward incoming calls to the boss's voicemail, or transfer a call on the boss's line. Bosses can pick up held calls on a delegate's line. The following figure shows an incoming call notifications on a boss's and delegate's phone.

Incoming Call on Boss's phone

The following figure shows a notification for an incoming call for the boss's line on a delegate's phone.

Incoming call for a boss on a delegate's phone

To answer an incoming call on a boss line:

» Press **Answer** on your phone. The boss's line is notified when a call is answered on a delegate's line, as shown in the next figure.

When a boss or delegate places a call on hold, the other is notified of the call's status. A red flashing light displays next to the boss or delegate's line to indicate a call is on hold, as shown next.

Held Call on boss's line

To resume a call on hold on a boss's line:

1 Press the boss's line key.

2 Select **Pickup**.

Call on Behalf of a Boss

You can make phone calls on behalf of your assigned boss's line.

To call on behalf of a boss:

1 Select the boss's line key and press **On behalf**.

2 Select a contact or dial the contact's number. The call displays as 'On Behalf of' boss's line on the delegate and third-party's phones.

Transfer Calls

The SLA feature enables you to transfer calls in two ways:

- **Blind transfer**   Transfers the call without speaking with the boss or delegate's line.

- **Consultative Transfer**   Transfers the call after speaking with the boss or delegate's line.

To perform a consultative transfer:

1 Press the **Transfer** soft key.

2 Dial the number or choose a contact.

To perform a blind transfer:

1 Press **Transfer > More > Blind**.

2 Dial the number or choose a contact, as shown next.

Access the Lync Directory

You can connect your phone to the Lync directory when you register and sign in with Lync Server on your Polycom phone. You can call contacts directly from the Lync Directory and save Lync contacts from the Lync Directory to the Corporate Directory.

To search the Lync Directory:

1. Select **Directories > Lync Directory**. A search screen displays.

2. Enter your search criteria and press **Submit**. Your search results display, as shown next.

To save a contact from the Lync Directory:

1. Search for your contact.

2. Select your contact.

3. Select **More > Add to Contacts.**

To call a contact from the Lync Directory:

1. Search for your contact.

2. Select your contact and press the **Dial** soft key.

Connect with Better Together over Ethernet

Better Together over Ethernet (BToE) enables you to place, hold, and answer calls on your Polycom phone and Lync client on your computer. To use BToE, connect your phone to your computer using your Lync client, an Ethernet cable, and the Polycom BToE Connector, which you can download on the Latest Polycom UC Software Release support page.

**Web Info: Better Together over Ethernet Feature Profile**

You can find more information on BToE and the Polycom BToE Connector in Feature Profile 87907: Using Polycom VVX Phones with Better Together over Ethernet.

To enable BToE on your computer:

1. Install and start the **Polycom BToE Connector** on your computer.

2. Connect an Ethernet cable from your PC to the PC port on your phone.

3. Sign into your Lync client on your computer.

To enable BTOE on your phone:

» Select **Settings > Features > BTOE > BTOE (Disabled)** and select **Enabled**, as shown next.
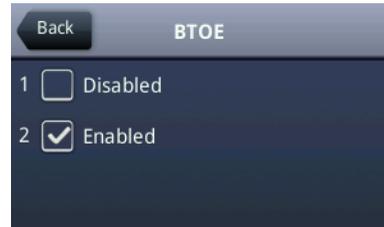
To pair your phone with your computer:

1. Select **Settings > Features > BTOE Pairing Status > Pair**.
   A message 'Successfully Paired' displays.

2. Enter your login credentials on your computer.
   On your phone, the messages "Successfully Paired" and "Better Together Activated" display.

Note: Reconnecting BTOE

When you disconnect your computer from your Polycom phone, your computer is no longer paired with your phone. For example, if you shut down your computer or unplug the Ethernet cable, you need to repeat the process of pairing your Polycom phone to your computer.

Use Better Together over Ethernet

You can place, answer, and hold calls on your Polycom phone and your Lync client on your computer.

To place a call from your Lync client:

1. In your Lync client, choose a contact.

2. Select **Call**. The call displays on your Polycom phone and the Lync client.

To hold a call:

» Select **Hold** on your Lync client or the phone. The call is on hold on your computer and your Polycom phone.

To resume a call:

» Press **Resume** on your phone or click **Resume Call** in your Lync client.

Note: Video Calls on Paired Devices Not Compatible with Microsoft Lync 2013

BToE-enabled Polycom phones running UC software 5.0.0 cannot receive incoming video calls sent from contacts using Microsoft Lync 2013. However, you can receive video calls from contacts using Lync 2010. If you receive an incoming video call from a contact using Lync 2013, the call drops.

View the Lync Contact Card

You can view the Lync contact card for each of your Lync contacts and make calls directly to any of the available numbers, including mobile, home, or voicemail, from the Contact Information screen on your phone.

In the contact card, you can view a contact's name, presence status, organization, work number, mobile number, and voicemail in the Contact Information screen.

Note: Changing privacy relationship to view detailed contact information

In order for you to view a contact's detailed information, the contact must change your privacy relationship to Friends and Family in his or her Lync client. If a contact has not changed your privacy relationship, you can only view the work number, email address, and voicemail for that contact.

To view the contact card:

1. Select the **Contact** soft key.

2. Select a contact and select **Info**.
   The contact card displays with your contact's presence status and contact information, as shown next.

Tip: Quickly viewing the contact card
You can quickly view the contact card for a Lync contact by pressing and holding a contact's line key. The contact card displays with your contact's presence and contact information.

From the contact card, you can place a call to one of the available numbers for your contact. You can also place a call directly to a contact's voicemail.