USER GUIDE

6.2.11 | June 2020 | 3725-49794-001A

Poly CCX Business Media Phones with OpenSIP

Getting Help
For more information about installing, configuring, and administering Poly/Polycom products or services, go to Polycom Support.

Plantronics, Inc. (Poly — formerly Plantronics and Polycom)
345 Encinal Street
Santa Cruz, California
95060

© 2020 Plantronics, Inc. All rights reserved. Poly, the propeller design, and the Poly logo are trademarks of Plantronics, Inc. All other trademarks are the property of their respective owners.

PLANTRONICS + POLYCOM. NOW TOGETHER AS poly

Contents

Before You Begin.....9

Audience, Purpose, and Required Skills.....9
Related Documentation.....9

Getting Started..... 10

CCX Phone Hardware Overview.....11
Poly CCX 400 Business Media Phone Hardware.....11
Poly CCX 500 Business Media Phones Hardware.....13
Poly CCX 600 Business Media Phone Hardware..... 14
Poly CCX 700 Business Media Phone Hardware..... 16
LED Indicators on CCX Phones.....17
Navigating Poly CCX Phones..... 18
Poly CCX Business Media Phone Screens.....18
Entering Information Using the Onscreen Keyboard.....24
Entering Chinese Characters with PinYin..... 24
Using the PinYin Input Widget.....24
Enter Chinese Characters with the Dial Pad Keys.....24
Enter Chinese Characters with the Onscreen Keyboard.....25

Logging In to and Locking Your Phone.....26

Logging In to Your Poly CCX Phone..... 26
Log In to a Phone.....26
Log Out of the Phone..... 27
Change Your Login Password.....27
Log In to a Host Phone.....27
Log In to a Guest Automatic Call Distribution Phone..... 28
Sign In Using Your BroadSoft UC-One Credentials..... 28
Locking Your Phone..... 29
Lock Your Phone..... 29
Unlock the Phone.....30

Audio Calls.....31

Use the Handset, Headset, or Speakerphone..... 31
Placing Audio Calls..... 32
Place an Audio Call.....32
Place an International Call..... 32
Place a Call from Recent Calls.....32

Call a Favorite..... 33
Place a Call over Bluetooth..... 33
Place a Call from a Locked Phone..... 33
Redial a Number..... 33
End an Audio Call..... 34
Answering Audio Calls..... 34
Answer an Incoming Call..... 34
Answer a Call When in a Call..... 34
Answer Calls Automatically..... 34
Answer a Call on a Locked Phone..... 35
Answer an Intercom Call..... 35
Decline an Incoming Call..... 35
Holding and Resuming Calls..... 35
Hold a Call..... 35
Resume a Call..... 36
Calling Contacts from Directories..... 36
Call a Contact from a Directory..... 36
Call a Contact from a Directory Search..... 36
Placing Intercom Calls..... 36
Place an Intercom Call..... 37
Place an Intercom Call During a Call..... 37
Managing Multiple Calls..... 37
Manage a Call from the Calls Screen..... 37
Transferring Calls..... 38
Transfer a Call Using Blind Transfer..... 38
Transfer a Call Using Consultative Transfer..... 38
Cancel a Transfer..... 38
Mute the Microphones..... 39
Unmute the Microphones..... 39
Call Precedence and Preemption..... 39
Parking and Retrieving Calls on the BroadSoft BroadWorks Server..... 39
Park a BroadSoft Call..... 40
Retrieve a Parked BroadSoft Call..... 40
Retrieve a Parked BroadSoft Call on Another Phone..... 40
Ignore a Parked Call..... 41
Managing Calls Remotely with Broadworks Server..... 41
Managing Calls with BroadSoft UC-One BroadWorks Anywhere..... 41
Managing Calls with BroadSoft UC-One Remote Office..... 43
Ignoring or Rejecting Incoming Calls..... 43
Ignore or Silence an Incoming Call..... 44
Reject Incoming Calls..... 44
Automatically Reject Calls from a Contact..... 44

Rejecting Calls with Do Not Disturb..... 44
Reject Anonymous Calls..... 45

Recording Audio Calls.....47

Guidelines When Recording Calls..... 47
Record a Call..... 48
Pause a Recording.....48
Resume a Recording..... 48
Stop Recording..... 48
Record a Conference Call.....49
Browse Recorded Calls.....49
Play a Recorded Call..... 49
Pause and Resume Played Recordings..... 49
Stop Playing a Recording.....50
Rename a Recording..... 50
Delete a Recording..... 50

Video Calls..... 51

Tips for Video Calls..... 51
Place a Video Call.....52
Start Video During a Call.....52
Stop Sending Video During a Call.....52
Video Call Settings.....52
Set the Call Rate for Video Calls.....53
Stop Video for All Calls.....53
Improve Video Clarity..... 53
Adjust Video Quality..... 54
Adjust the Video Display.....54
Adjust the Camera Position During a Call..... 54
Changing the Video Call and Picture-in-Picture (PIP) Displays..... 55
Mixed Audio and Video Calls..... 56
No Video from the Far Side.....56
Using a USB Camera with Your Phone.....56
Use the Privacy Shutter on the Camera to Stop Sending Video..... 57
Camera Status Indicators and Messages..... 57
Managing Video Calls without a USB Camera.....58

Conference Calls..... 59

Audio Conference Calls..... 59
Initiate a Conference Call..... 59

Merge Calls into a Conference Call....59
End a Conference Call....59
Hold a Conference Call....60
Resume a Conference Call....60
Split a Conference Call....60

Shared Lines....61

Shared Line Limitations....61
Answering Calls on Shared Lines....61
Missed and Received Calls on Shared Lines....61
Hold a Call Privately on a Shared Line....61

Call Lists and Directories....63

Recent Calls....63
View Recent Calls....63
Sort Recent Call Entries....63
Sort Entries by Call Type....64
View Call Details....64
Edit a Recent Call Entry....64
Delete a Recent Call Entry....64
Save a Recent Call Entry....64
Favorites and Contact Lists....65
Managing Favorites....65
Using Buddy Lists....66
Contact Directory....68
Search for Contacts....69
Add a Contact to the Contact Directory....69
View Contact Information....69
Update a Contact's Information....69
Delete a Contact from the Contact Directory....70
Corporate Directory....70
Searching the Corporate Directory....70
Add Corporate Directory Contacts to the Local Directory....71

Accessing, Sending, and Broadcasting Messages....72

Accessing Voicemail....72
Access Voicemail Messages....72
Remove the Message Alert....73
Instant Messaging....73
Send Instant Messages....73

Read Instant Messages....73
Reply to Instant Messages....74
Delete Instant Messages....74
Broadcasting Messages with Group Paging....74
Send a Group Page....74
Receiving Pages....75
Group Paging Settings....76
Broadcasting Messages with Push to Talk....77
Send a PTT Broadcast....77
Receiving PTT Broadcasts....78
Reply to PTT Broadcasts....78
End PTT Broadcasts....79
Push To Talk Settings....79

Poly CCX Phone Settings....81

Password Required to Access Basic Settings....81
Set the System Language....81
Disable Call Waiting....82
Time and Date Display....82
Change the Time and Date Format....82
Disable the Time and Date Display....82
Backlight Intensity and Timeout....82
Set the Backlight Intensity....83
Set the Backlight Timeout....83
Changing Your Background....83
Change the Background Picture....83
Adding Personal Photos as Your Background....84
Reset Your Background....85
Screen Savers....85
Enable Screen Savers....85
Use Personal Photos as Screen Savers....86
Disable the Screen Saver....86
Use Your Phone as a Digital Picture Frame....87
Picture Frame Icons....87
Power Saving Mode....88
Change Your Office Hours for Power Saving Mode....88
Change Idle Timeouts for Power Saving Mode....88
Changing Audio Settings....89
Change Incoming Call Notifications....89
Set a Ringtone for Incoming Calls....89
Set a Ringtone for Individual Contacts....89

Change the Volume....90
Updating Your Buddy Status....90
Update Your Buddy Status....90
Automatically Update Your Buddy Status....90
Security Classification....91
View the Security Classification for Your Phone....91
Modify Security Classification Level....91
Clear Call Logs and Contacts....91
Restrict Call Log and Contact Uploads....92

Phone Applications....93
Using the Calendar....93
Enter Your Microsoft Exchange Login Credentials....93
Log in to Exchange Using Web Sign-in....93
Open the Calendar....94
Display Meeting View on the Calendar....94
View Meeting Details....94
Join a Meeting from the Calendar....94
Navigating the Web and Idle Browsers....95
View the Idle Browser....95
Open the Web Browser....95
Using the Launch Pad....96
Access the Launch Pad....96
Open Applications....96
Navigate the Launch Pad....97
Display the Launch Pad's Main Screen....97
Enable My Info Portal....97

Connecting Bluetooth and USB Devices....98
Enable Bluetooth....98
Using Bluetooth Devices on Your Phone....98
Using Bluetooth Headsets....99
Pairing a Smartphone to Your Phone....99
Disconnect and Unpair Your Bluetooth Device....100
Play Audio from a Bluetooth Device....101
Using Electronic Hookswitch....101
Setting the Headset Base Unit Options....101
Enable Electronic Hookswitch....101
Change the Headset Mode....102
Controlling Calls with Electronic Hookswitch....102
Disconnect Your Headset....102

Connecting to a Wireless Network..... 103

Connect to a Wireless Network..... 103
Disconnect from a Wireless Network..... 103
Remove a Wireless Network..... 104

Broadsoft Features..... 105

BroadSoft Directories..... 105
View a List of BroadSoft Contacts..... 105
Searching the BroadSoft Directory..... 106
Add BroadSoft Contacts to the Local Directory..... 106
Managing a Personal BroadSoft Directory..... 107
Managing BroadSoft UC-One Favorites and Contacts..... 107
BroadSoft UC-One Contacts' Presence Information..... 108
Viewing BroadSoft UC-One Contacts and Favorites..... 108
View Aggregated Self-Presence for BroadSoft Lines..... 109
Filter BroadSoft UC-One Favorites..... 109
Search for BroadSoft UC-One Contacts..... 109
BroadSoft UC-One Simultaneous Ring..... 110
Create a Personal Ring Group..... 110
Add Numbers to Your Simultaneous Ring List..... 110
Delete Numbers from the Simultaneous Ring List..... 111
BroadSoft Executive-Assistant..... 111
Executive Options..... 111
Assistant Options..... 112
Pick Up a Held Executive Call on a Shared Line..... 114
Pick Up a Held Executive Call on a Private Line..... 114
Barge In on an Executive Call..... 114
Access the Call Actions for BroadWorks Dynamic Busy Lamp Field (BLF)..... 115

Ribbon Communications Features..... 116

Ribbon Communications Multiple Appearance Directory Number - Single Call Appearance..... 116
Placing a MADN Call..... 116
Answering a MADN Call..... 116
Barge In on an Active Call..... 116
Leave a Bridge Call..... 117
Resume a Held MADN Call..... 117
Enabling Privacy for MADN Calls..... 117
Managing the Ribbon Communications Address Books..... 118

Using the Global Address Book....119
Using the Personal Address Book....120

Accessibility Features.... 122

Users Who Are Deaf or Hard of Hearing....122
Users with Limited Mobility....123
Users Who Are Blind, Have Low Vision, or Have Limited Vision.... 123

Maintaining Your Phone....124

Investigate Warnings....124
Remove Warnings....124
Reboot Your Phone....125
Update the Phone's Configuration 125
Test the Hardware....125
Clean the Touchscreen.... 125
View Software Details.... 126
Updating the Phone Software.... 126
Update the Phone Software.... 126
Update the Software Later.... 126
Postpone Software Updates....127
Exit the Software Update Notification....127
CSTA Lines.... 127

Troubleshooting.... 128

Speakerphone....128
USB Port.... 128
Check the Status of the Calendar.... 129
Ribbon Communications Address Book....129
View the Status of the Personal Address Book....129
Polycom Desktop Connector....129
Troubleshoot Audio and Echo Issues....130
Bluetooth Headset Issues.... 130
Recording Issues and Solutions....131
Reset the Phone to Factory Defaults.... 131

Before You Begin

Topics:

- Audience, Purpose, and Required Skills
- Related Documentation

This *Poly CCX Business Media Phones User Guide* contains overview information for navigating and performing tasks on Poly CCX.

This user guide contains information for the following Poly products and accessories:

- CCX 400 business media phones
- CCX 500 business media phones
- CCX 600 business media phones
- CCX 700 business media phones
- Polycom® EagleEye™ Mini USB camera

Audience, Purpose, and Required Skills

This guide is intended for beginning users, as well as intermediate and advanced users who want to learn more about the features available with CCX.

Related Documentation

You can view the following types of documents on each product support page on Polycom Voice Support:

- Quick Tips—A quick reference on how to use the phone's most basic features.
- setup sheet—This guide describes the contents of your package, how to assemble the phone or accessory, and how to connect the phone to the network. This guide is included in your phone package.
- Wallmount Instructions—This document provides detailed instructions for mounting your phone on the wall. To install your phone on the wall, you need the optional wallmount package, which includes the wallmount instructions.
- Administrator Guide—This guide provides detailed information about setting up your network and configuring features.
- Regulatory Notice—This guide provides information for all regulatory and safety guidance.

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

Getting Started

Topics:

- CCX Phone Hardware Overview
- Navigating Poly CCX Phones
- Entering Information Using the Onscreen Keyboard
- Entering Chinese Characters with PinYin

Before you use your phone, familiarize yourself with its features and user interface.

Note: As you read this guide, remember that your system administrator configures certain features or your network environment may determine them. 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 available options or what your device screen displays.

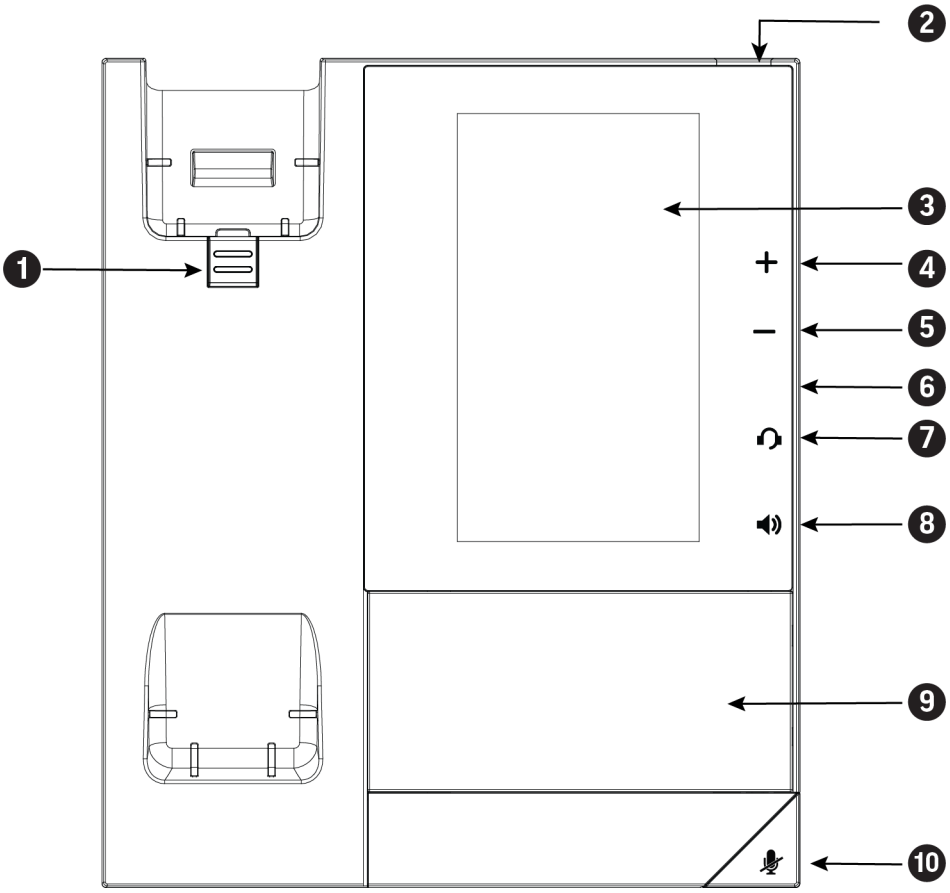
CCX Phone Hardware Overview

The following topics describe the hardware features for Poly CCX business media phones.

Poly CCX 400 Business Media Phone Hardware

The following figure displays the hardware features on Poly CCX 400 business media phones. The table lists each feature numbered in the figure.

Figure 1: Poly CCX 400 phone hardware features



Poly CCX 400 Phone Hardware Feature Descriptions

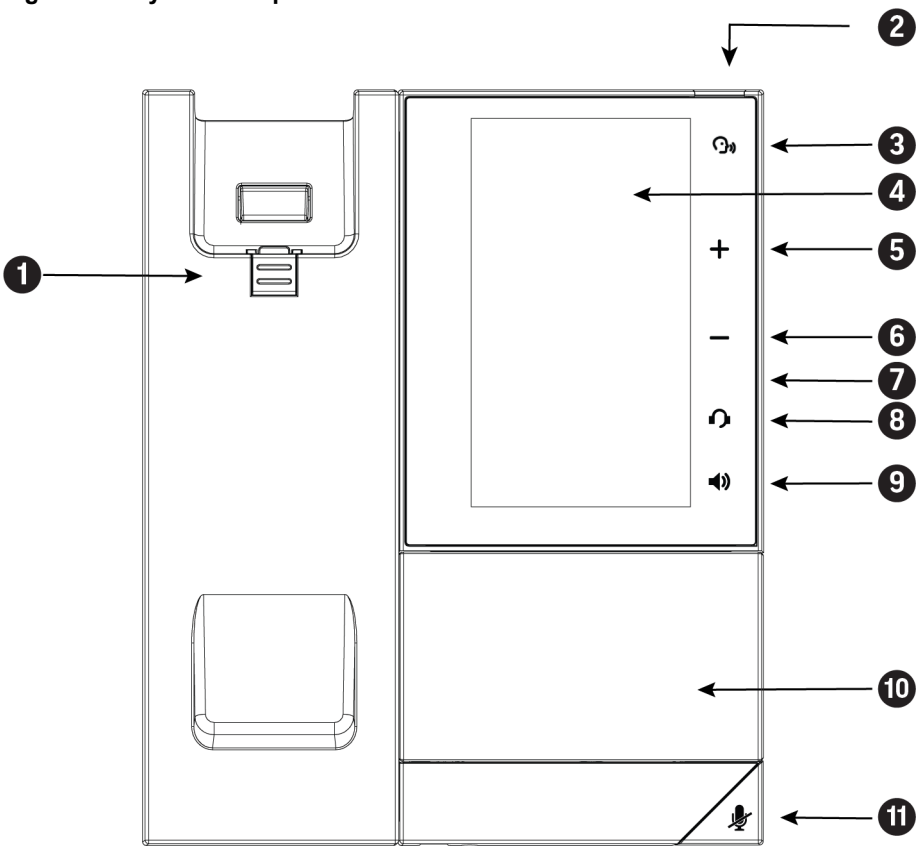
Reference Number	Feature	Feature Description
1	Reversible tab	Secures the handset in the cradle when you position your phone stand at a high angle. To secure the handset, remove the tab, reverse it so the protrusion points up, and reinsert it. Position the handset so the protrusion on the tab fits into the slot on the handset.
2	Message waiting indicator	Flashes red to indicate you have an incoming call or a new message.

Reference Number	Feature	Feature Description
3	Touchscreen	Enables you to select items and navigate menus on the touch-sensitive screen.
4, 5	Volume keys	Adjusts the volume of the handset, headset, speaker, and ringer.
6	USB port(s)	Enables you to attach a USB flash drive or USB headset. CCX 400 phones contain one USB-A port.
7	Headset indicator	Displays when the phone is powered on. The icon glows green or blue when a headset is connected and activated.
8	Speakerphone indicator	Displays when the phone is powered on. The icon glows green when activated.
9	Speaker	Provides ringer and speakerphone audio output.
10	Mute key	Mutes local audio during calls and conferences.

Poly CCX 500 Business Media Phones Hardware

The following figure displays the hardware features on Poly CCX 500 business media phones with OpenSIP. The table lists each feature numbered in the figure.

Figure 2: Poly CCX 500 phone hardware features



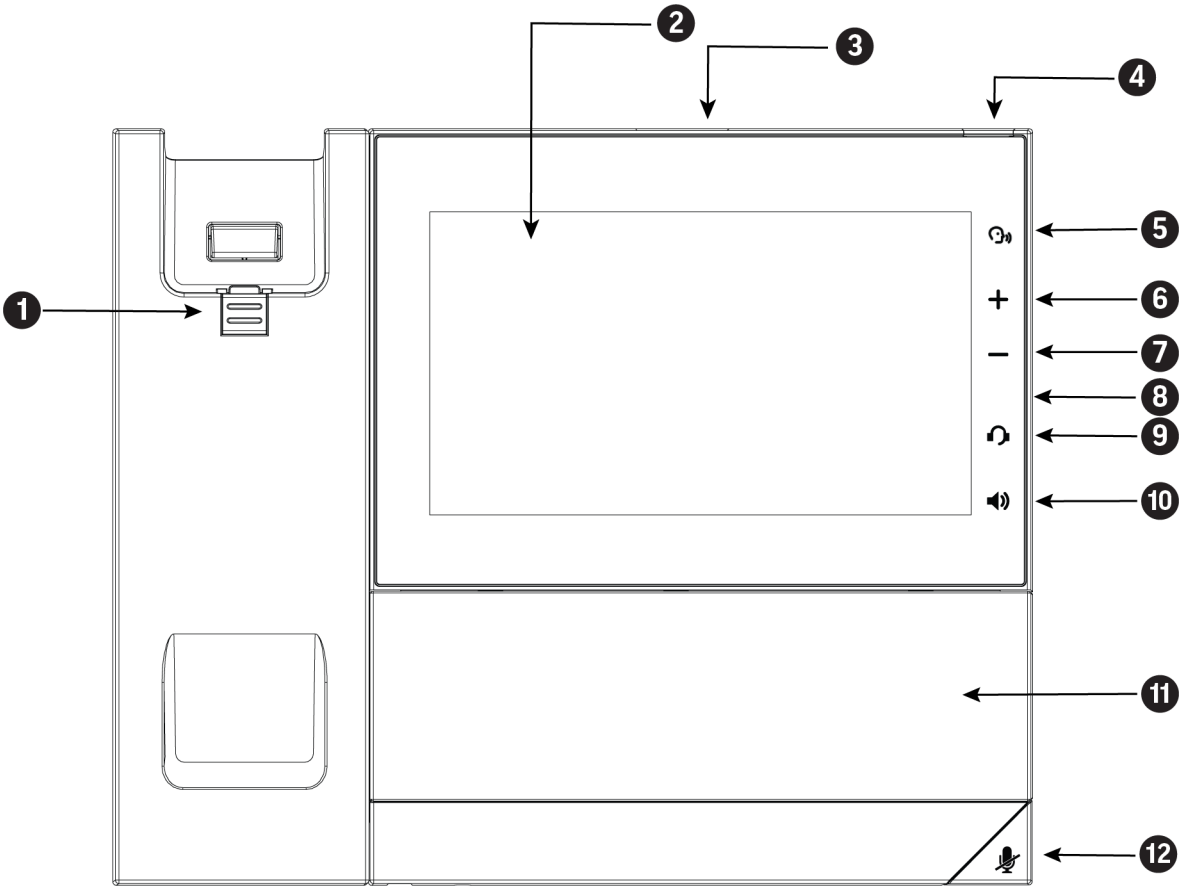
Reference Number	Feature	Feature Description
1	Reversible tab	Secures the handset in the cradle when you position your phone stand at a high angle. To secure the handset, remove the tab, reverse it so the protrusion points up, and reinsert it. Position the handset so the protrusion on the tab fits into the slot on the handset.
2	Message waiting indicator	Flashes red to indicate you have an incoming call or new messages.
3	Application Command	Displays when the phone is powered on and the service is available. Icon may vary.
4	Touchscreen	Enables you to select items and navigate menus on the touch-sensitive screen.
5,6	Volume keys	Adjusts the volume of the handset, headset, speaker, and ringer.

Reference Number	Feature	Feature Description
7	USB port(s)	Poly CCX 500 phones include one USB-A port and one USB-C port.
8	Headset indicator	Displays when the phone is powered on. The icon glows green or blue when a headset is connected and activated.
9	Speakerphone indicator	Displays when the phone is powered on. The icon glows green when activated.
10	Speaker	Provides ringer and speakerphone audio output.
11	Mute key	Mutes local audio during calls and conferences.

Poly CCX 600 Business Media Phone Hardware

The following figure displays the hardware features on Poly CCX 600 business media phones. The table lists each feature numbered in the figure.

Figure 3: Poly CCX 600 Phone Hardware Features



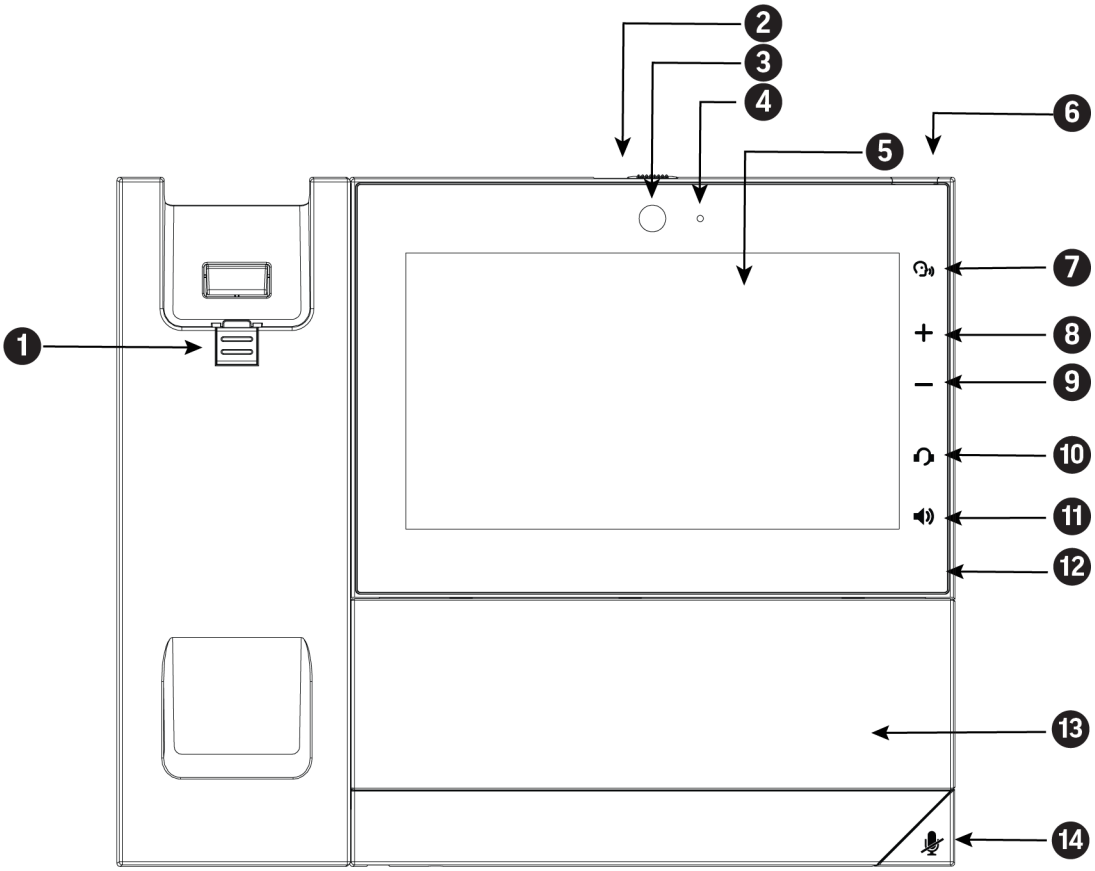
Poly CCX 600 Phone Hardware Feature Descriptions

Reference Number	Feature	Feature Description
1	Reversible tab	Secures the handset in the cradle when you position your phone stand at a high angle. To secure the handset, remove the tab, reverse it so the protrusion points up, and reinsert it. Position the handset so the protrusion on the tab fits into the slot on the handset.
2	Touchscreen	Enables you to select items and navigate menus on the touch-sensitive screen. Tap the screen to select and highlight screen items. To scroll, touch the screen, and swipe your finger up, down, right, or left.
3	Camera Port	Enables you to attach an optional Polycom EagleEye Mini USB camera.
4	Message waiting indicator	Flashes red to indicate you have an incoming call or new messages.
5	Application Command	Displays when the phone is powered on and the service is available. Icon may vary.
6,7	Volume keys	Adjusts the volume of the handset, headset, speaker, and ringer.
8	USB port(s)	One USB-A port and one USB-C port.
9	Headset indicator	Displays when the phone is powered on. The icon glows green or blue when a headset is connected and activated.
10	Speakerphone indicator	Displays when the phone is powered on. The icon glows green when activated.
11	Speaker	Provides ringer and speakerphone audio output.
12	Mute key	Mutes local audio during calls and conferences.

Poly CCX 700 Business Media Phone Hardware

The following figure displays the hardware features on Poly CCX 700 business media phones. The table lists each feature numbered in the figure.

Figure 4: Poly CCX 700 Phone Hardware Features



Poly CCX 700 Phone Hardware Feature Descriptions

Reference Number	Feature	Feature Description
1	Reversible tab	Secures the handset in the cradle when you position your phone stand at a high angle. To secure the handset, remove the tab, reverse it so the protrusion points up, and reinsert it. Position the handset so the protrusion on the tab fits into the slot on the handset.
2	Privacy Shutter	Allows you to cover the camera lens.
3	Built-in Camera	Enables you to send video during a video-enabled call.
4	Camera LED	Turns green when the camera is on and sending video. Turns amber when you are not sending video.

Reference Number	Feature	Feature Description
5	Touchscreen	Enables you to select items and navigate menus on the touch-sensitive screen. Tap the screen to select and highlight screen items. To scroll, touch the screen, and swipe your finger up, down, right, or left.
6	Message waiting indicator	Flashes red to indicate when you have new messages.
7	Application Command*	Displays when the phone is powered on and the service is available. Icon may vary.
8,9	Volume keys	Adjusts the volume of the handset, headset, speaker, and ringer.
10	Headset indicator	Displays when the phone is powered on. The icon glows green or blue when a headset is connected and activated.
11	Speakerphone indicator	Displays when the phone is powered on. The icon glows green when activated.
12	USB port(s)	CCX 700 phones contain one USB-A port and one USB-C port. You can connect a USB flash drive to USB-C port and a headset to USB-A port.
13	Speaker	Provides ringer and speakerphone audio output.
14	Mute key	Mutes local audio during calls and conferences.

LED Indicators on CCX Phones

The LEDs on Poly CCX phones indicate phone and accessory states.

CCX Phones LED Descriptions

LED	Color State and Description
Speakerphone	Off – Phone is in sleep mode. White – Speakerphone is off, but the phone is active. Green – Speakerphone is on.
Headset	Off – Phone is in sleep mode. White – No headset is active. Green – An electronic hookswitch (EHS) headset is connected and activated. Blue – A USB or Bluetooth headset is connected and activated.

LED	Color State and Description
Mute	Off – No call is active. Red – The phone microphone is muted.
Message Waiting Indicator (MWI)	Off – No new messages are available. Blinking Red – New or unread voicemails are available, incoming call and missed call.

Navigating Poly CCX Phones

The phone has icons, status indicators, and user screens to help you navigate and understand important information on the state of your phone.

Poly CCX Business Media Phone Screens

Your phone includes three screens including the main screen, calendar screen, and the lines screen.

- Home screen (Default)—includes softkey shortcut keys, and favorites. Softkeys on your home screen may be different depending on your configuration.
- Lines screen – displays assigned lines and favorite contacts.
- Meetings screen—displays today's meetings (if enabled).

Access the Home Screen

The home screen is the default home page providing access to assigned soft keys, lines, and favorite contacts.

Note: Your phone may display different home screen soft keys depending on how your administrator configured your phone.

Figure 5: CCX with OpenSIP Default Home Screen

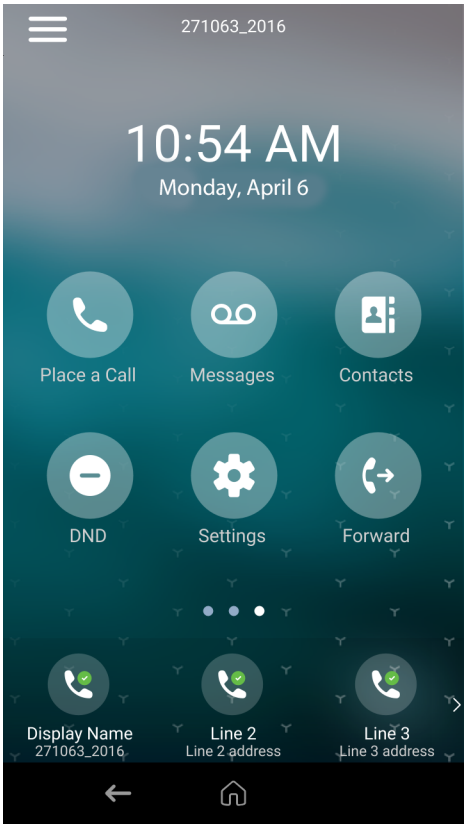


Figure 6: CCX 600 and CCX 700 Default Home Screen

Procedure

» To access the home screen:

- If you set the lines screen or meetings screen as your home page, swipe left on the touchscreen.
- If you set the lines screen as your home page, select the home icon.

Access the Lines Screen

The lines screen provides access to all assigned lines and your favorite contacts.

Figure 7: CCX 400 and 500 Lines Screen

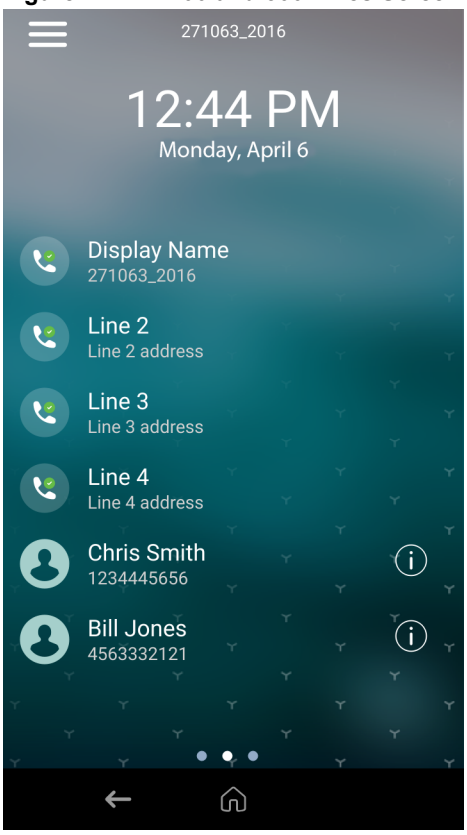
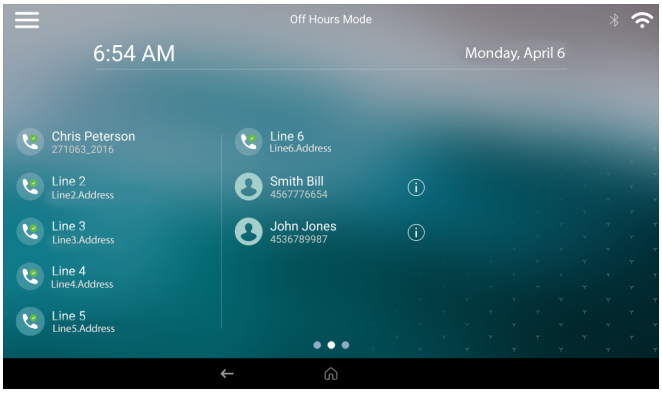


Figure 8: CCX 600 and CCX 700 Lines Screen



Procedure

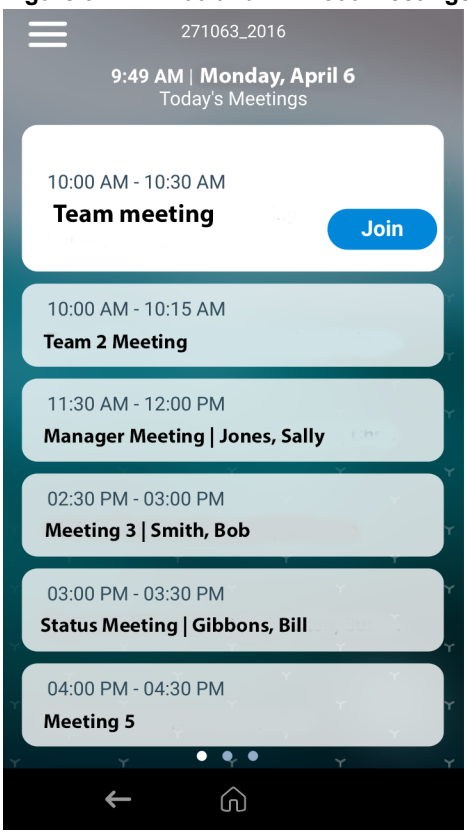
» To access the lines screen:

- If you set the home screen or meetings screen as your home page, swipe left on the touchscreen.
- If you set the lines screen as your home page, select the home icon.

Access Meetings View

The meetings view is available when your administrator enables Microsoft Exchange calendaring on your phone.

Figure 9: CCX 400 and CCX 500 Meetings Screen



Meetings view displays scheduled meeting for the current day. To view meeting details, select a meeting.

Procedure

» Choose from:

- If you set the home screen or lines screen as your home page, swipe left on the touchscreen.
- If you set the meeting screen as your home page, press the home button.

Access the Calls Screen

The calls screen provides access to the phone dialer, your calls logs, contacts, and your calendar (if configured).

Figure 10: CCX 400 and CCX 500 Calls Screen

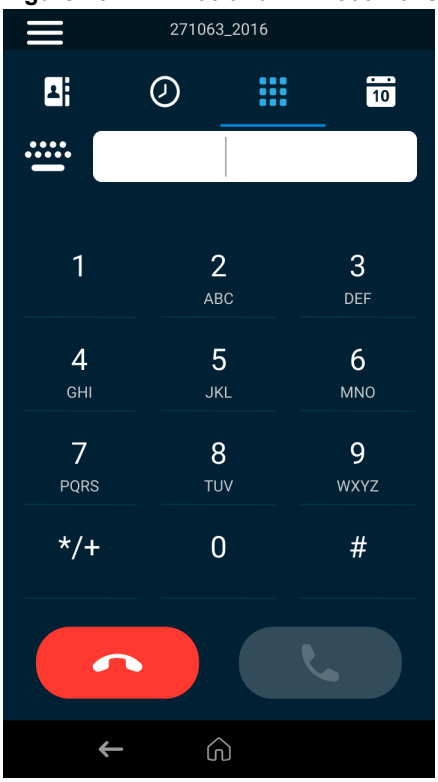
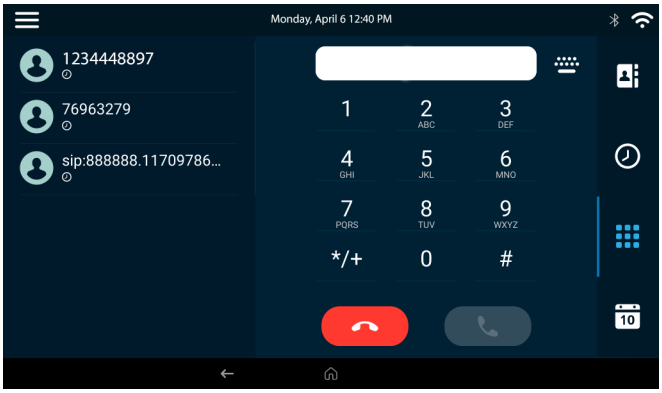


Figure 11: CCX 600 and CCX 700 Calls Screen



Procedure

» Do one of the following:

- On the home screen, select **Place a Call**.
- Select **Menu** > **Place a Call**.
- Pick up the headset, press the headphone icon, or press the speakerphone icon.

Access the Active Call Screen

Return to an active call from another screen.

You can navigate away from the active call screen to perform other tasks on the phone. If you select the dialer, the phone places the active call on hold.

Procedure

» Choose from:

- From the top of the screen, select **Return to Calls**.
- Select the line for the active call.

Access the Settings Menu

If enabled by your administrator, you can access the settings menu to personalize your phone settings.

Procedure

» Choose from:

- From the home screen, select **Settings**.
- Select **Menu** > **Settings**

Icons and Status Indicators

The following table displays the icons and status indicators that display on your phone.

Icons and Status Indicators

Icon	Description
	Registered Line
	Unregistered Line
	Active Call
	Call Forwarding enabled
	Missed Call
	Placed Call
	Received Call
	Bluetooth
	USB attached
	Do Not Disturb enabled
	Configuration Warning message

Entering Information Using the Onscreen Keyboard

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

The onscreen keyboard displays when a text field displays. When a text field requires only numbers, it displays a numerical keypad instead.

The following icons also display on the keyboard:

- **Letters** ABC: Displays alphabetical letters
- **Uppercase** ⇧: Shifts to uppercase letters
- **Lowercase** ⇧: Shifts to lowercase letters
- **Numbers and Punctuation** ?123: Displays numbers and punctuation marks
- **Special characters** =\<: Displays special characters

Entering Chinese Characters with PinYin

The PinYin text input feature uses Nuance XT9 Smart Input to enable you to enter Chinese characters into text fields using the phone's dial pad keys.

You can use the PinYin input widget to enter Chinese characters in the contact directory, corporate directory, and browser using the dial pad keys on your phone. When you select a data field to edit, the PinYin input widget automatically displays when you set Simplified or Traditional Chinese as the language on your phone.

Note: For more information on the PinYin text input method, see the Nuance's XT9 Smart Input website.

Using the PinYin Input Widget

Use the PinYin input widget to enter Chinese characters in the contact directory, corporate directory, and browser.

When you select a data field to edit, the PinYin input widget automatically displays when you set Simplified or Traditional Chinese as the language on your phone.

Enter Chinese Characters with the Dial Pad Keys

You can use the dial pad keys and the PinYin input widget to enter Chinese characters on CCX phones.

The PinYin input widget disappears if you press the Pound key # or don't press a key for 5 seconds.

Procedure

1. Enter the PinYin text that corresponds with the digits on the phone's dial pad.

   For example, press `7464`.

   The possible PinYin matches display in the text field with the first match highlighted.
2. Press the Star key * to toggle between selections.

   The recommendation area shows the possible character matches. A navigation indicator displays if more matches are available.

3. Use the left and right arrow keys or swipe the recommendation area on the touch screen to change the selected character.
4. Press **Select** to select the character from the recommendation area.

   After you select the character, it displays in the input field at the cursor location.

Enter Chinese Characters with the Onscreen Keyboard

You can use the onscreen keyboard and the PinYin input widget to enter Chinese characters on supported CCX phones.

Procedure

1. Tap .
2. Tap to verify that PinYin is the default input mode.

   A list of language options display.
3. Ensure that **XT9 PinYin** is selected.
4. Enter the PinYin text using the onscreen keyboard.
5. Tap ✓ on the onscreen keyboard to select the character from the recommendation area.

Logging In to and Locking Your Phone

Topics:

- Logging In to Your Poly CCX Phone
- Locking Your Phone

Sign in to your phone with your credentials and lock your phone using a lock code.

Logging In to Your Poly CCX Phone

If your system administrator has set up user credentials for your phone, you can log in to a phone and access your contacts or favorites, settings, and calendar (if enabled).

You can view your personal settings from any phone or system within your organization. Contact your system administrator for your user credentials.

Note: Some of the features described in this section require access to the **Basic** settings menu. If your phone requires a password to access the **Basic** settings menu, contact your system administrator for assistance.

Related Links

Enter Your Microsoft Exchange Login Credentials on page 93
Log in to Exchange Using Web Sign-in on page 93

Log In to a Phone

Depending on how your system administrator set up your user login options, you may need to log in to a Poly phone before you can use one.

By default, Poly devices don’t require you to log in before you can use them. If you don’t log in, you see the default profile. When you log in, you have full access to your personal settings and your directory.

Any settings you change while logged in on a public phone commit to your profile and display the next time you log in to any phone.

Procedure

1. If you see the **User Login** screen, proceed to the next step.
2. Enter your user ID and password, and select **Log In**.

   Your personal profile displays when you enter the correct login credentials. If you enter incorrect credentials, a message indicating that your login attempt has failed displays and the **User Login** screen displays again. Check with your system administrator to confirm your login credentials.

Log Out of the Phone

After you finish using a public phone, make sure you log out to prevent access to your personal settings.

Procedure

1. Select **Log Out** or go to **Settings** > **Features** > **User Login** > **Log Out**.

   The **Log Out** screen displays with a confirmation message.
2. Select **Yes**.

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

Change Your Login Password

You can change your login password from any phone on your network.

Procedure

1. Log in to a phone on your network.
2. Go to **Settings** > **Features** > **User Login** > **Change User Login Password**.
3. On the **Change User Login Password** screen, enter your old and new password information and select **Enter**.

   Your password changes. The next time you log in to a phone, you must enter your new password.

Log In to a Host Phone

When CCX phones are registered with the BroadSoft BroadWorks server and your system administrator has enabled the Flexible Seating feature, you can log in to your guest profile on a host phone, which is a shared public phone, to place calls to emergency numbers as defined by your system administrator.

Your system administrator provides you with login credentials that you can use to log in to a host phone. When you log in to a host phone, you have limited access to your personal phone settings and your directory. You can access the BroadSoft Directory and BroadSoft UC-One Favorites, but you cannot access your Contact Directory or general favorites from a host phone.

Procedure

1. Do one of the following:
   - If you see the **Guest In** screen.
   - If you do not see the **Guest In** screen, press the **Guest In** soft key.
2. From the **Guest In** screen, enter your username and password and select **OK**.

   When your login credentials are accepted, the phone updates to display your personal phone profile. If your credentials are not accepted, a message indicating that your login credentials are invalid is displayed, and the phone displays the Lines screen. Check with your system administrator to confirm that your login credentials are correct.

Log Out of a Host Phone

After you use a phone, make sure you log out to prevent unauthorized users from using your guest profile to place calls or access your personal settings.

After you log out of the host phone, you can no longer view your guest profile information nor view any changes or call history made on the host phone on your personal phone. If you are logged into your ACD account when you log out of the host phone, you are automatically logged out of your ACD account.

If your system administrator has set a guest PIN for your account, you must enter your PIN to log out of a host phone. If you do not sign out of a host phone after a designated time set by your system administrator, you are automatically logged out of the host phone.

Procedure

1. Select the **Guest Out** soft key.
2. If prompted, enter your guest PIN.

   Your personal profile is no longer accessible, and the phone displays the default host profile.

Log In to a Guest Automatic Call Distribution Phone

Log in to your Automatic Call Distribution (ACD) account after you log in as a guest on a host phone.

Your system administrator enables Flexible Seating with the ACD on your phone.

Note: When you log in to a host phone as a guest user, the Use Host softkey isn't available.

If your system administrator enables Hoteling, you don't need to log in as a guest before you log in to your ACD account.

On a guest ACD phone, answer incoming calls from call center customers, update your presence status, view incoming call center information, and transfer calls.

Procedure

» Do one of the following:

- If you see the **Agent Sign In** screen, sign in.
- If you don't see the **Agent Sign In** screen, press the **ASignIn** softkey or go to **Settings** > **Features** > **Agent Sign In** > **Sign In**.

Log Out of a Guest ACD Phone

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

Procedure

» Select the **ASignOut** soft key or navigate to **Settings** > **Features** > **Agent Sign In** > **Sign Out**.

The phone displays the default guest profile.

Sign In Using Your BroadSoft UC-One Credentials

You can enter your BroadSoft UC-One credentials on your phone and view your line registered with the BroadWorks server.

Your system administrator provides your BroadSoft UC-One credentials.

Procedure

1. Go to **Settings** > **Basic** > **UC-One Credentials**.
2. Enter the **Server Address**.
3. Enter your user name.
4. Enter your password.

Locking Your Phone

Your system administrator provides you with a user password that you can use to unlock the phone.

Locking your phone prevents unauthorized people from placing or answering calls. It also prevents anyone from viewing or modifying phone information, such as your directory, call lists, or favorites.

When you lock your phone, you can do the following:

- Place outgoing calls to emergency and authorized numbers only
- Place outgoing calls to a contact, unless your system administrator restricts your phone to placing calls to emergency and authorized numbers only
- Enter a password to answer incoming calls
- Answer incoming calls, unless your administrator has set your phone to require a password to answer calls

Lock Your Phone

You can choose how you want your phone to handle incoming calls when it's locked. When you set up your phone to receive incoming calls when locked (the default setting), incoming calls ring on your phone, and you can answer calls by entering your user password.

When you set up your phone to ignore incoming calls, Don't Disturb applies to all lines on your phone, and your phone doesn't ring.

Note:
- When the Flexible Seating feature is enabled and you're logged in as a guest on a host phone, the Phone Lock feature is only available if your system administrator has set a 4 - 10-digit guest PIN for your user account. If you don't see the Lock softkey or menu option, check with your system administrator to see if this feature is available on your phone.
- There will be no response when you press the Back key if the phone is locked.

Procedure

1. Select **Lock** or navigate to **Settings** > **Basic** > **Lock Phone**.
2. From the **Lock Phone** screen, select **Allow ringing when locked** (the default setting) if you want your phone to ring when you have an incoming call.

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

   Your phone is locked.

Tip: You can quickly lock your phone by selecting the Lock softkey. When you do this, you can't choose how to handle incoming calls. Your phone uses the default setting or the last setting selected.

Unlock the Phone

You can unlock the phone with your lock code.

Procedure

1. Select **Unlock**.
2. Enter your lock code and select **Unlock**.

Audio Calls

Topics:

- Use the Handset, Headset, or Speakerphone
- Placing Audio Calls
- End an Audio Call
- Answering Audio Calls
- Decline an Incoming Call
- Holding and Resuming Calls
- Calling Contacts from Directories
- Placing Intercom Calls
- Managing Multiple Calls
- Transferring Calls
- Mute the Microphones
- Unmute the Microphones
- Call Precedence and Preemption
- Parking and Retrieving Calls on the BroadSoft BroadWorks Server
- Managing Calls Remotely with Broadworks Server
- Ignoring or Rejecting Incoming Calls

By default, your phone has one registered line.

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

Use the Handset, Headset, or Speakerphone

You can place and answer calls on your phone using the handset, headset, or speakerphone, and you can alternate among the three modes during calls, if available.

When using the speakerphone, the Speakerphone key glows green. When using the headset, the Headset key glows green if an analog headset is connected or blue if a USB headset is connected.

Procedure

» During a call, pick up the handset, press the Headset key or press the Speakerphone key .

For example, if you're using the handset, press the Headset key to switch to the headset, or press the Speakerphone key to switch to the speakerphone.

Placing Audio Calls

Poly phones enable you to place calls to local numbers, international numbers, and contacts.

You can initiate calls from your favorites list, recent calls list, and your phone directory. From a locked phone, you can place calls to numbers authorized by your system administrator.

Related Links

Place a Video Call on page 52

Place an Audio Call

You can call a contact using a number or IP address from the dialpad or onscreen keyboard.

Procedure

1. Choose from:
   - On the home screen, select **Place a Call**.
   - Select **Menu** > **Place a Call**.
   - Pick up the headset, press the headphone icon, or press the speakerphone icon.
2. Enter your contact's number, or select the onscreen keyboard and enter an IP address.
3. Select **Dial** .

Place an International Call

You can place calls to international phone numbers on your phone.

Procedure

1. Do one of the following:
   - On the home screen, select **Place a Call**.
   - Select **Menu** > **Place a Call**.
   - Pick up the headset, press the headphone icon, or press the speakerphone icon.
2. On the dialpad, quickly press the star key (*) twice.

   A plus sign (+) displays.
3. Enter the country code and phone number then select **Dial** .

Place a Call from Recent Calls

You can place calls from the **Recent Calls** list, which contains calls that you recently placed, answered, or missed.

Procedure

1. Do one of the following:
   - From the **Home** screen, select **Recent Calls** .
   - From the **Place a Call** screen, select **Recent Calls** .
2. Select a contact.

The call begins automatically after you select a contact.

Call a Favorite

Contacts you add as favorites display at the bottom of the **Home** screen with an avatar. You can place a call to favorites by selecting the favorite's avatar.

Procedure

» On the **Home** screen, select a favorite.

Place a Call over Bluetooth

You can pair and connect your phone with a Bluetooth–enabled mobile phone or tablet. Calls placed call on your device and use the phone as a speakerphone for the call. These steps apply to most mobile phones and tablets. For more information refer to your mobile phone or tablet's product documentation.

Procedure

1. Connect your device with the phone over Bluetooth.
2. On your device, place a call to a contact and select the CCX as the audio source.

Place a Call from a Locked Phone

When the phone is locked, you can place outgoing calls only to emergency numbers, such as 911 and authorized numbers that your system administrator can set up. You cannot call any other numbers from a locked phone.

Procedure

1. Do one of the following:
   - On the home screen, select **Place a Call**.
   - Pick up the headset, press the headphone icon, or press the speakerphone icon.
2. From the **Place an Authorized Call** screen, choose a number and select **Dial**.

Redial a Number

Your phone automatically keeps a record of all calls placed. You can recall the last contact you called using **Redial**, if enabled by your system administrator.

Procedure

» Do one of the following:
   - Select **Redial**.
   - Go to **Place a Call** > **Recent Calls** ⏲, and select the first number in the list.

End an Audio Call

You can end active calls at any time. To end a held call, resume the call and then end it.

Procedure

» Do one of the following:
- Select **Hang Up** .
- On the **Calls** screen, select the call and select **Hang Up** .
- On the **Calls** screen, select a held call, select **Resume** , and select **Hang Up** .
- If you're using the handset, return the handset to the cradle.

Answering Audio Calls

When you receive an incoming call on your phone, you can choose to answer the call in a number of different ways.

Answer an Incoming Call

When you receive an incoming call, the phone rings and the **Incoming Call** screen displays. On the **Incoming Call** screen, you can choose to answer or reject the incoming call.

Procedure

» Select **Answer** .

If enabled, you can answer calls using the **Mute** button.

Answer a Call When in a Call

When you're in an active call and an incoming call arrives on the same or a different line, a call waiting tone beeps and the **Incoming Call** screen displays.

Procedure

» Select **Answer**.

This places the active call on hold, and the incoming call becomes active.

Answer Calls Automatically

You can set up your phone to automatically answer calls using Auto Answer.

When enabled, the phone automatically answers all incoming calls using the speakerphone. Your system administrator sets how many times the phone rings before it automatically answers the call.

The phone doesn't automatically answer a call until you place your current call on hold or end it.

Procedure

1. Go to **Settings** > **Basic** > **Preferences**.

2. Select **Auto Answer**.
3. Select **Auto Answer SIP Calls** and select **Yes**.
4. Select **Microphone Muted** and choose **Yes** (the default setting) to mute the microphone for auto-answered calls.
5. Select **Save**.

Answer a Call on a Locked Phone

You can enable your phone to accept calls while it's locked. To answer calls on a locked phone, enter your password.

Procedure

1. On the **Incoming Call** screen, select **Answer**.
2. Enter your password and select **Enter**.

   The call connects.

Answer an Intercom Call

When you receive an intercom call, your phone answers the call automatically using the speakerphone as long as you don't have an active call already.

If the phone answers an intercom call with your microphone muted, you must unmute your microphone before responding to the call.

Decline an Incoming Call

You can decline an incoming call and send the call directly to voicemail.

Declined calls display in the **Missed Calls** list in **Recent Calls**. You can’t decline calls for shared lines.

Procedure

» In the **Incoming Call** screen, select **Decline**.

Holding and Resuming Calls

When you are in a call, you can place an active audio call on hold and resume the call.

Hold a Call

Place an active call on hold.

Procedure

» During an active call, select **Hold**.

Resume a Call

View and resume a held call.

Procedure

» Do one of the following:
- Select **Resume**.
- From the **Calls** screen, select the call and select **Resume**.

Calling Contacts from Directories

On CCX business media phones, you can search for and call contacts in your Contact Directory, and the Corporate Directory.

Call a Contact from a Directory

Place a call directly from your directory or select contacts in your directory to call on the **Place a Call** screen.

Procedure

1. Do one of the following:
   - Select **Contacts** and select a directory.
   - Select **Place a Call** and select **Contacts**, and select a directory.
2. Select a contact.

Call a Contact from a Directory Search

Search for and call contacts on the **Search** screen in your directory.

Procedure

1. Select **Directories**, then select **Contacts** and select a directory.
2. In the **Search** field, enter your contact's name.
3. Select a contact.

Placing Intercom Calls

Like a normal call, the intercom feature enables you to place a call to a contact.

An intercom call differs from a normal call in that the call recipient's phone answers automatically when not in an active call. Check with your system administrator to find out if this feature is available on your phone.

If the call recipient has an active call, the recipient can choose to answer the intercom call. Otherwise, the phone answers the intercom call automatically after their active call ends.

Place an Intercom Call

You can place an intercom call from your phone to quickly relay a message to a contact.

Tip: Your system administrator can set up your phone to automatically call a specific contact when you select **Intercom**. If your phone is set up this way, select **Intercom** and wait for your contact to answer before speaking your message.

Procedure

1. Select **Intercom**.
2. Enter a number or select a contact.
3. Select **Dial**.

   The phone plays a tone and the contact's phone answers the call automatically.
4. After your contact answers the call, speak your message and select **End Call**.

Place an Intercom Call During a Call

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

Procedure

1. Select **Hold** > **Intercom**.

   The active call goes on hold and the dialpad displays.
2. Enter a number or select a contact.
3. Select **Dial**.

   The phone plays a tone and the contact's phone answers the call automatically.
4. After your contact answers the call, speak your message and select **End Call**.
5. Select **Resume**.

Managing Multiple Calls

Manage multiple active, incoming, or held calls.

In the **Calls** screen, you can view active and held calls, including conference calls. The following figure shows an active call and a held call.

Figure 12: Multiple calls on the calls screen

Manage a Call from the Calls Screen

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

Procedure

1. Select a call.
2. Do one of the following:
   - Select **Hold** to place an active call on hold.
   - Select **Resume** to make a held call active.

- Select **End Call** to end a call with a contact. You can end active calls only, so resume the held call first before ending it.
- Select **Transfer** to send the call to another contact.

Transferring Calls

You can transfer active or held calls to another contact.

Use one using the following transfer types:

- Blind transfer - Transfers the call directly to another line without speaking with the other party first.
- Consultative transfer - Enables you to speak with the other party before completing the transfer.

Transfer a Call Using Blind Transfer

When you use Blind call transfers, calls transfer as soon as the recipient's line connects.

Procedure

1. During a call, select **Transfer** .
2. Dial a number or select a contact from **Recent Calls** or **Contacts**.

   The call transfers as soon as the recipient's line connects.

Transfer a Call Using Consultative Transfer

When you use consultative call transfers, you can speak with the recipient and then manually complete the transfer.

Procedure

1. During a call, select **Consult** .

   The phone places the caller on hold while you start the transfer.
2. Dial a number or select a contact from **Recent Calls** or **Contacts**.
3. When the recipient answers, speak with them and then select **Complete Transfer** to transfer the call.

   If the recipient either doesn't answer your call, or can't accept the call transfer and hangs up before you transfer the call, the original caller stays on hold. You can resume that call or try to transfer to another recipient.

Cancel a Transfer

If a contact doesn't answer the transfer or if you want to remain speaking with the contact on your line, you can cancel the transfer before it completes.

Procedure

» Select **Cancel**.

The call doesn't transfer and becomes active.

Mute the Microphones

Mute the microphone so other parties can't hear you.

Procedure

» Do one of the following:
- Select **Mute** .
- Select the Mute key on the phone.
- Select the Mute key on the microphone.

Unmute the Microphones

Unmute your audio when you’re ready to speak and let others on the call hear you.

Procedure

» Do one of the following:
- Select **Unmute** .
- Select the Mute key on the phone.
- Select the Mute key on the microphone.

Call Precedence and Preemption

If your administrator has enabled call precedence and preemption, your outgoing calls are assigned a precedence level.

If you are in an active call and receive a new call with a higher precedence, your active call is preempted —ended. If your call is preempted, your phone plays a preemption tone and displays a preemption screen. The preemption screen is shown both for caller and callee. After you acknowledge the preemption screen, you can answer, reject, or ignore it. The notification screen disappears if you do not acknowledge the preemption notification after the display time out as defined by your admin.

Parking and Retrieving Calls on the BroadSoft BroadWorks Server

When your phone is registered with a BroadSoft BroadWorks server, you can use Call Park to park a call directly to a contact's line.

Call Park is different from call hold in that the call is parked on another contact's line, which enables you to continue using your phone to place other calls. Call Park is also available for shared lines. Check with your system administrator to find out if this feature is available on your phone.

Park a BroadSoft Call

You can park a call directly on a contact's line. When you park a call on a contact's line, the call is removed from your phone and the contact is notified that a call is parked on his or her line.

When a contact sends a parked call to your extension, the following notifications are displayed or played on your phone:

- The Call Park icon Ⓟ.
- The message “Call is parked” in the status bar.
- An audio notification plays, if enabled by your system administrator. Audio notifications are not available for BLF monitored contacts.

The Call Park icon Ⓟ also displays for shared lines, monitored contacts, and for lines and monitored contacts on connected expansion modules.

Procedure

» During a call, press **Hold** and dial ***68** and the contact’s line extension.

For example, dial `*684144`.

Retrieve a Parked BroadSoft Call

When a contact parks a call on your line, the status message and the Call Park icon display on your phone until the parked call is either retrieved, ignored, or the parked caller ends the call.

If a parked call is not answered after a period of time, which is set by your system administrator, the call is returned to the parker—the person who parked the call. If the parker answers the returned call, the parked call is removed from the parked extension. If the parker rejects the returned call, the parked call remains on the parked extension until the call is returned to the parker and answered or the parked caller ends the call.

Procedure

1. Press and hold the line key with the parked call.

   The **Park Info** soft key is displayed.
2. Press the **Park Info** soft key.

   The **Parked Call** screen is displayed.
3. Press **Retrieve**.

Retrieve a Parked BroadSoft Call on Another Phone

You can retrieve a parked call from any phone within your network.

When a parked call is retrieved by a contact monitoring your line, the Call Park icon Ⓟ and status message is removed from the line.

Procedure

» Press **New Call** and dial ***88** and the extension the call was parked on.

For example, dial **884144*.

Ignore a Parked Call

You can choose to ignore a parked call instead of retrieving the call.

Ignoring the parked call removes the parked call icon, but the call remains parked on your line until the call is retrieved, the retrieval time expires, or the call is ended.

Procedure

1. Press and hold the line key with the parked call.

   The **Park Info** soft key is displayed.
2. Press the **Park Info** soft key.

   The **Parked Call** screen is displayed.
3. Press **Ignore**.

   The phone exits the Parked Call screen, and the Call Park icon Ⓟ and status message is removed from the line.

Managing Calls Remotely with Broadworks Server

Manage calls to your line remotely using the BroadWorks Anywhere or Remote Office features.

When you register your phone with a BroadWorks server and sign in to BroadSoft UC-One, you can manage calls to your line remotely.

You can handle any incoming calls to your office phone on other phones or mobile devices. Move calls from your mobile device to your desk phone without ending the call.

Check with your system administrator to find out if these features are available on your phone.

Managing Calls with BroadSoft UC-One BroadWorks Anywhere

BroadWorks Anywhere is a BroadSoft UC-One feature that enables you to use one phone number to receive calls on your desk phone, mobile phone, or home office phone and place calls from any of these phones using one number.

BroadWorks Anywhere also enables you to move calls between your desk phone and mobile phone as well as perform any additional functions, such as intercom calls that you would make from your desk phone.

Contact your system administrator or service provider for more information on using BroadWorks Anywhere.

Enable BroadWorks Anywhere

Enable BroadWorks Anywhere (BWA) to add locations that act as duplicates of your desk phone. Once you enable and configure BWA, you can manage calls from any of your added locations.

Note: The phone supports up to 10 phone numbers added as BWA locations for each registered line.

You can save a location name, primary number, and alternate number for each location you add. When you add a location, you can also choose to enable the following settings:

- Diversion Inhibitor—Determines if you need to enable diversion inhibitor when extending a call to the remote BWA location.

- Answer Confirmation Required —Requires confirmation when a remote location answers a call.
- Call Control—Determines if the BWA location or the BroadWorks server handles the call control.

Procedure

1. Do one of the following:
2. Select a line.
3. Select **BroadWorks Anywhere** and press **Add**.
4. Enter information for the **Status**, **Name**, **Primary Number**, and **Alt. Number/SIP URI** fields, if applicable.
5. Choose the settings you want to enable.
6. Select **Save**.

Edit BroadWorks Anywhere Locations

After you enable BroadWorks Anywhere and add locations on phone, you can edit the added locations.

Procedure

1. Do one of the following:
2. Select a line.
3. Select **BroadWorks Anywhere** and select a location.
4. Edit the selection.
5. Select **Save**.

Disable BroadWorks Anywhere Locations

When you return to the office or want to stop remotely managing your calls, you can disable BWA locations.

Procedure

1. Do one of the following:
2. Select a line.
3. Select **BroadWorks Anywhere** and select a location.
4. Select **Status** > **Disabled**.
5. Select **Save**.

Remove BroadWorks Anywhere Locations

You can choose to remove BroadWorks Anywhere locations that you do not want to manage remote calls from anymore.

Procedure

1. Do one of the following:
2. Select a line.
3. Select **BroadWorks Anywhere** and select a location.
4. Select **Delete**.

Managing Calls with BroadSoft UC-One Remote Office

With the Remote Office feature, you can forward all incoming calls to a remote office number, such as your mobile or home office number.

Remote Office allows you to use your mobile or home phone as your office phone. Answer your office phone calls from your mobile device or home phone. Calls from your remote office number display your office number on the recipient's caller ID.

For more information on using Remote Office, contact your system administrator or service provider.

Add a Remote Office Number

You can add one number only as your remote office number.

Procedure

1. Do one of the following:
2. Select a line.
3. Select **Remote Office**.
4. Enter your remote office number and press **Enabled**.
5. Select **Save**.

   All calls made to your desk phone forward to the remote office number.

Disable Remote Office

When you return to the office or want to stop forwarding your calls, make sure you disable Remote Office.

Procedure

1. Do one of the following:
2. Select a line.
3. Select **Remote Office** > **Disabled**.
4. Select **Save**.

Edit Your Remote Office Number

You can edit your remote office number to add a different number for forwarding your calls.

Procedure

1. Do one of the following:
2. Select a line.
3. Select **Remote Office**.
4. Enter the new number and select **Save**.

Ignoring or Rejecting Incoming Calls

When you receive an incoming call, you can choose to ignore or reject the call instead of answering. You can reject or ignore incoming calls, reject incoming calls from a specific contact, or enable Do Not Disturb to reject all calls for a brief period of time.

Note: You cannot reject calls on shared lines. You can only silence the ringer.

Ignore or Silence an Incoming Call

Ignore or silence a call to mute the ringer without rejecting the call.

When you ignore a silence a call, the incoming call notification continues to display.

Procedure

» From the **Incoming Call** screen, do one of the following:

- Select **Ignore** for private lines.
- Select **Silence** for shared lines.

The **Incoming Call** screen disappears, your phone stops ringing, and either the Home or Calls screen displays.

Reject Incoming Calls

You can reject a call and send the call directly to voicemail. Rejected calls display in the **Missed Calls** list in your **Recent Calls** list. Rejecting calls is not available for shared lines.

Procedure

» On the **Incoming Call** screen, select **Decline**.

Automatically Reject Calls from a Contact

You can send incoming calls from a particular contact directly to voicemail.

Procedure

1. Go to **Directories** > **Contact Directory**.
2. From your **Contact Directory**, select a contact.
3. On the **Contact Information** screen, select **Edit** .
4. From the **Edit Contact** screen, select **Auto Reject** > **Enabled** and select **Save**.

   Calls from the contact go directly to voicemail when the contact calls.

Rejecting Calls with Do Not Disturb

Do Not Disturb (DND) enables you to set your phone to automatically reject calls when you don’t want to be interrupted.

When you enable DND, you see the following:

- The **DND** icon displays in the status bar.
- When the phone is idle, the **DND** icon displays next to your phone line.
- When the administrator enables hybrid line registration on the phone, you can choose **All** to enable DND on all the registered lines.
- If you have new messages or you have enabled call forwarding, the messages or forwarding icon display instead of the **DND** icon.

Note: When you set your presence status to **Do Not Disturb** and enable **DND** on your phone, a message reflecting your Do Not Disturb status scrolls under the time display. The **DND** icon doesn't display in the status bar.

Enable Do Not Disturb

Enable DND to prevent your phone from ringing and to send all incoming calls to voicemail. The phone logs all calls you receive while on DND in the **Recent Calls** list.

DND on shared lines disables ringing only. A visual notification of the call still displays, and you can answer or ignore the call.

Procedure

- » Select **DND**.

Reject Calls with Do Not Disturb on Multiple Lines

Use Do Not Disturb to reject incoming calls when you're busy.

Note: By default, Do Not Disturb applies to all lines on your phone. Your system administrator can enable you to select the lines DND applies to.

Procedure

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

Reject Calls with Do Not Disturb on One Line

If enabled, you can choose to enable DND on a particular line.

Procedure

1. Select **DND**.
2. From the **Line Select** screen, select a line.
3. From the **Do Not Disturb** screen, select **Enable**.

Disable Do Not Disturb

When you're ready to receive calls, disable DND.

Procedure

- » Select **DND**.

Reject Anonymous Calls

When your phone is registered with a BroadWorks server and you are signed into the phone with your BroadSoft UC-One credentials, you can use the Anonymous Call Reject (ACR) feature to automatically reject anonymous calls to your line from callers who have restricted their caller identification.

Check with your system administrator to find out if this feature is available on your phone.

Procedure

1. Do one of the following:
2. If your phone has multiple lines, select a phone line.
3. Select **Anonymous Call Reject**.
4. On the **Anonymous Call Reject** screen, select **Enabled**.

   When an anonymous call is placed to your phone number, the call is automatically rejected and the caller hears a message stating that you do not accept calls from unidentified numbers. Your phone does not ring, and you are not notified of an attempted call.

Recording Audio Calls

Topics:

- Guidelines When Recording Calls
- Record a Call
- Pause a Recording
- Resume a Recording
- Stop Recording
- Record a Conference Call
- Browse Recorded Calls
- Play a Recorded Call
- Pause and Resume Played Recordings
- Stop Playing a Recording
- Rename a Recording
- Delete a Recording

On CCX 400, CCX 500, CCX 600, and CCX 700 phones, you can record audio calls onto a USB flash drive connected to your phone.

Recordings save as `.wav` files on the USB flash drive, and you can record up to four hours in one `.wav` file. You can replay recordings on the phone or on a computer.

For a list of supported USB flash drives to record phone audio, see *Technical Bulletin 38084: Supported USB Devices* at Polycom Support.

Note: If your phone doesn't detect the USB device when you insert it into the USB port, the USB port on your phone may be disabled. Contact your system administrator for assistance using the USB port.

Guidelines When Recording Calls

Use the following guidelines when recording audio calls on your phone.

- Inform contacts when you're recording a call.
- Make sure to mute your audio when you're placed on hold while recording the call.
- 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, 2019, 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

The phone allows you to record an active audio call. Make sure to inform your contacts on the call before you begin recording.

Some things to note about recording:

- You can't record when there are no connected calls, when you place a new call to transfer a call or initiate a conference, or when you have an incoming call.
- Your phone records some tones that your contact's phone makes.
- When you mute your microphone while recording, the phone doesn't record your audio and records only the other participants' audio.

Procedure

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

Pause a Recording

During a call, you might need to pause a recording while the call is active.

Procedure

» Select **Menu** > **Pause Recording**.

The message `Recording Paused` displays in the status bar.

Resume a Recording

After you pause and then resume recording, recording continues in the same file.

Procedure

» Select **Menu** > **Resume Recording**.

Stop Recording

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

Caution: Don't remove the USB flash drive while recording. Doing so may corrupt the file, preventing you from playing it back later. Removing the USB flash drive while recording can also damage the flash drive.

Procedure

» Select **Menu** > **Stop Recording** or hang up the call.

Record a Conference Call

You can record a conference call in the same way as an active call with the following exceptions:

- All conference call participants are recorded. When a conference participant mutes their audio, that participant is not recorded.
- When you place a conference call on hold, the recording pauses. You can place or answer other calls, which are recorded in the same file. When you resume the conference call, the recording resumes.

Procedure

» During a conference call, select **Menu** > **Start Recording**.

Browse Recorded Calls

You can browse recorded files stored on the USB flash drive connected to supported phones.

Procedure

» Go to **Settings** > **Features** > **Removable Storage Media** > **Browse Recordings**.

A list of recordings displays.

Play a Recorded Call

Play back calls recorded on a USB flash drive connected to your phone.

Note: You can’t open and play recordings when you are in an active call or if you’re recording a call. If you try to, the phone cancels the action. Place the call on hold before playing recordings. The recording stops playing when you resume the call.

Procedure

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

   A list of recordings displays.
2. Select a recording.
3. Select **Open** > **Play**.

   The length of the recording and a progress bar displays 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 phone automatically pauses the recording playback. If you don’t answer or reject the incoming call, the recording remains paused until you select **Resume**.

Procedure

1. To pause the recording, select **Pause**.
2. Select **Resume** to continue playing the recording.

Stop Playing a Recording

After you finish listening to a recording, you can stop playing it by exiting the recording.

Procedure

» Select **Exit**.

Rename a Recording

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

Procedure

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

   A list of recordings displays.
2. Select a recording.
3. Select **Rename**, update the file name, and select **OK**.

Delete a Recording

When you've played a recording or need additional space on your USB drive, delete recordings from the phone.

Procedure

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

   A list of recordings displays.
2. Select a recording.
3. Select **Delete**.

Video Calls

Topics:

- Tips for Video Calls
- Place a Video Call
- Start Video During a Call
- Stop Sending Video During a Call
- Video Call Settings
- Mixed Audio and Video Calls
- No Video from the Far Side
- Using a USB Camera with Your Phone
- Managing Video Calls without a USB Camera

You can receive and transmit video during calls on supported phones with cameras, if enabled by your system administrator.

Note: Due to several limitations with video functionality, Poly does not recommend testing video in this beta release. Full video functionality will be available in a future beta release.

Note: Some of the features described in this section require access to the **Basic** settings menu. If your phone requires a password to access the **Basic** settings menu, contact your system administrator for assistance.

You can place video calls on the following Poly CCX phones:

- Poly CCX 700 business media phones
- Poly CCX 600 business media phones (with the optional Poly EagleEye Mini Camera)

  The EagleEye Mini is an optional CCX 600 USB accessory. See the USB camera setup sheet for information on how to attach the camera to your phone.

Tips for Video Calls

There are several things to consider when you place a video call to ensure the best experience.

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

- Avoid tapping or rustling papers near the microphone.

Place a Video Call

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

Procedure

1. Select **Place a Call**.
2. Enter a contact's number or select a contact from Contacts or Recent Calls.
3. Select **Dial** .
4. If video does not display automatically, select **Add Video**.

Related Links

Placing Audio Calls on page 32

Start Video During a Call

If you start a video-enabled call with your camera off, you can turn it on to start sending video.

Procedure

» On the Call screen, select **Camera On**.

Stop Sending Video During a Call

During a video call, you can start and stop sending video at any time.

Note: You can’t start or pause far-end video. If your phone receives far end video, the far end video always displays.

Procedure

» Do one of the following:

- Close the privacy shutter.

  Far side participants see a black screen in place of your video.
- Select **Camera Off**.

  Far side participants see a video muted icon in place of your video.

Video Call Settings

Update video settings to change the way video calls display on your video-enabled phone.

If you update settings during a call, the phone does not apply them until the next call.

Note: Some of the features described in this section require access to the **Basic** settings menu. If your phone requires a password to access the **Basic** settings menu, contact your system administrator for assistance.

Set the Call Rate for Video Calls

You can set the maximum call rate to use for a video call. The new call rate applies to your next video call.

You can choose a call rate between 128 kbps and 4096 kbps. The default setting is 2048 kbps.

Note: Your system administrator can set a maximum call rate for video calls, and you can't select a call rate above this limit.

Procedure

1. Go to **Settings** > **Basic** > **Call Rate**.
2. On the **Call Rate** screen, select the maximum call rate you want to use for video calls.

Stop Video for All Calls

You can stop your phone from automatically transmitting your video at the start of all calls by disabling the Auto Start Video Tx setting. The default setting is enabled, which automatically transmits video at the start of every call.

Note: Stopping video doesn't create an audio-only call. Even if you stop video, video information is still transmitted to the far side as a still picture, and the call is still a video call.

Procedure

1. Go to **Settings** > **Basic** > **Video** > **Video Call Settings**.
2. Select **Auto Start Video Tx** > **Disabled**.

   When disabled, your phone does not automatically transmit video at the start of all calls and the No Video icon is displayed next to your video during video calls.

Improve Video Clarity

You can change the target frame rate to improve video clarity.

The target frame rate determines how smoothly your video displays. You can set a rate between 5 and 30 frames per second. 30 frames per second is the smoothest frame rate. The default rate is 30.

Procedure

1. Go to **Settings** > **Basic** > **Video**.
2. Select **Camera Settings** > **Target Frame Rate**.
3. Choose **Up** or **Down** to adjust the frame rate.

Adjust Video Quality

You can adjust the camera settings on your Poly CCX system to improve video quality.

Procedure

1. Do one of the following:
   - Select **Camera** .
   - Select **Menu** > **Camera**.
2. Select **Settings** > **Camera Preferences**.
3. Adjust or toggle the following camera settings:
   - Brightness
   - White balance
   - Saturation
   - Sharpness
   - Backlight compensation

Adjust the Video Display

You can adjust video settings to control the appearance of video you receive from the far end.

Depending on how the far end video's aspect ratio differs from your display's aspect ratio, you can adjust how the video image displays on your screen.

Procedure

1. Go to **Settings** > **Basic** > **Video**.
2. Select **Video Screen Mode** and choose one of the following video screen settings:
   - **Normal**: The video image retains the aspect ratio sent from the far end. Black bars appear wherever the aspect ratio of the received video doesn’t match your screen.
   - **Full**: The system fits the video to the screen. Stretched portions of the video may appear distorted.
   - **Crop**: The system enlarges and crops the video to fit your screen without stretching the video.
3. Select **Save**.

Adjust the Camera Position During a Call

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

Procedure

1. Do one of the following:
   - Select **Camera** .
   - Select **Menu** > **Camera**.
2. Do one of the following:
   - Select **Near** to adjust your camera.

- Select **Far** to adjust a call participant’s camera.

3. Adjust the camera position using one of the following options:
   - Use the onscreen arrows.
   - Drag your finger across the onscreen video stream.
   - Select the onscreen video stream to move the camera to that position.
   - Select the plus sign to zoom the camera in or select the minus sign to zoom the camera out.
   - Move the slider to zoom the camera in or out.

Changing the Video Call and Picture-in-Picture (PIP) Displays

You can set up your phone so that it displays all video during calls in specific ways. You can choose to do the following:

- Display all incoming video calls on the full screen
- Change the way video displays
- View full-screen video with or without the picture-in-picture (PIP)
- Display the PIP next to, or over, full-screen video

Your video image displays at the top-right of the screen in a PIP video, as shown next. The PIP displays on your Home screen and during video calls. When you're in a call with a person that has video enabled, your video is displayed in the PIP. The person you're talking with (the far-side) is displayed in the Active Call screen.

Customize how and where you see your PIP video and the far-side video. For example, you swap the windows in which the video displays or start and stop your video transmission.

Note: Depending on the phone or system that is sending video, black bars might appear on the top, bottom, or sides of the video. Black bars appear when aspect ratio of the video received doesn’t match the display area on your phone. If the received video matches your phone's display area, the received video fills the screen. If black bars display, you can remove them by selecting cropped video screen mode.

Change How PIP Video Displays

Update the PIP display for viewing in full screen mode, viewing the far-side, or viewing your video on the full screen.

You can change the following PIP settings:

- Local Camera View (Full Screen)—Enables or disables the PIP from displaying when you view video on the full screen. The default setting is **Enabled**.
- Local Camera View Mode (Full Screen)—Sets whether you want the PIP to display over or next to full-screen video. The default setting is Side-by-Side. You can choose to enable one of these settings:
  - Side-by-Side—Displays the PIP next to, rather than over, full-screen video.
  - PIP—Displays the PIP over full-screen video.

Procedure

1. Go to **Settings** > **Basic** > **Video**.
2. Select **Local Camera View** then select and adjust the PIP settings.

3. Select **Save**.

Display All Video Calls in Full Screen Mode

By default, the far-side video always displays in the Active Call screen. You can enable your phone to display all incoming videos on the full screen.

Procedure

1. Go to **Settings** > **Basic** > **Video**.
2. Select **Video Call Settings** and select **Auto Video Full Screen** > **Enable**.

   When enabled, this setting automatically enables your phone to display far-side video in full screen. When disabled, far-side video is displayed in the smaller Active Call screen.
3. Select **Save**.

Mixed Audio and Video Calls

Your system displays different options based on the equipment you and your contacts use during a call.

- When you are in a call with contacts who have video-enabled phones, the participants' video displays on screen.
- For video calls with audio-only contacts, your video stream displays with an **Audio** icon with the number of contacts on audio.
- Video always displays in a video call when a contact can send video.

No Video from the Far Side

If the far side stops sending video, a No Video icon is displayed on your phone.

Using a USB Camera with Your Phone

To transmit video during calls, attach a USB camera to your CCX 600 phone.

Note: If your phone doesn't detect the USB camera, you may need to ask your administrator to enable the USB port.

Reference the setup sheet for instructions on attaching the camera to your phone.

After the camera is attached to your phone, a message indicating that your camera firmware is updating and syncing with your phone displays. Don't remove the camera during this process.

For assistance verifying that your phone is video enabled and has the latest software installed, check with your administrator.

Use the Privacy Shutter on the Camera to Stop Sending Video

You can use the privacy shutter on your USB camera to stop transmitting video during a call.

Procedure

» On the side of the camera lens, rotate the Privacy Shutter Adjuster from the left to the right.

Camera Status Indicators and Messages

Your camera has LED indicators that display on the camera and status messages that display on your phone.

Camera LED Indicators

LED State	Phone State
No LED	One of the following: • Phone has no power • Camera shutter is closed
Flashes amber and green	Camera firmware is updating
Green	Video call is connected
Amber	The camera is on and the shutter is open, but no video is being sent.

Camera Messages

Message	Action
Camera attached. Firmware sync in progress, do not remove camera. (CCX 600 only)	Your camera is upgrading. Do not remove your camera during this process. The upgrade is complete when you receive a message stating that either “firmware sync complete” or “upgrade failed”.
Camera firmware sync complete. Camera ready.	Indicates that your camera is ready to use.
Camera firmware sync complete. Contact administrator to enable video.	Indicates that your camera is ready to use. However, your phone is not enabled to send and receive video. Contact your system administrator to enable video calls.
Camera firmware sync complete. Camera rebooting.	Indicates that the camera firmware sync is finished and your camera is in the process of rebooting.
Camera firmware sync complete. Video available when next idle.	Indicates that your camera is ready to use for your next video call.
Camera attached, camera ready. (CCX 600 only)	Indicates that your camera is ready to use.

Message	Action
Camera attached. Contact administrator to enable video. (CCX 600 only)	Indicates that your camera is ready to use. However, your phone isn't enabled to send and receive video. Contact your system administrator to enable video calls.
Camera attached. Video available when next idle. (CCX 600 only)	Indicates that your camera is ready to use for your next video call.
Camera removed. (CCX 600 only)	Indicates that you have detached your camera from your phone.
Camera is not connected (CCX 600 only)	Indicates that a camera is not attached to your phone and that you are accessing a feature or function that requires that the camera be attached.

Managing Video Calls without a USB Camera

A video-enabled CCX 600 phone can receive video even if you don’t attach a USB camera.

Placing a video call on hold stops the video stream. The phone replaces the video with a placeholder image. Resume the video call to start the video stream.

Conference Calls

Topics:

- Audio Conference Calls

When you initiate a conference call, you can hear audio for two or more contacts, manage conference participants, and join calls into a conference or split a conference into individual calls.

Audio Conference Calls

Start a conference call with two contacts on hold. You can also split, hold, or resume conference calls.

If your system administrator enables the conference management feature on your phone, you can manage each participant in the call. With the conference management feature, you can mute, hold, and remove individual participants in a conference call.

Initiate a Conference Call

You can initiate a conference call with up to two contacts.

Procedure

1. In an active call, select **Add**.

   The phone places the first call on hold and opens the dialpad.
2. Call a second number or choose a contact.
3. Select **Merge Calls** .

   The calls merge to initiate a conference call.

Merge Calls into a Conference Call

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

Procedure

1. In the **Calls** screen, choose a held call.
2. Select **Merge** .

   The held call merges with the active call to initiate a conference call.

End a Conference Call

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

Procedure

- During a conference call, select **End Call**.

Hold a Conference Call

When you place a conference call on hold, you place all conference participants on hold.

Procedure

- Select **Hold** .

Resume a Conference Call

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

Procedure

- Select **Resume.**

Split a Conference Call

When you split an active or held conference call, the conference ends and places the other two participants on hold. You can then resume one of the held calls.

Procedure

- During a conference call, select the **Split** softkey.

  The conference call ends, and the two participants are held in two separate calls.

Shared Lines

Topics:

- Shared Line Limitations
- Answering Calls on Shared Lines
- Missed and Received Calls on Shared Lines
- Hold a Call Privately on a Shared Line

All CCX support multiple and shared lines. Your administrator can customize your phone to enable multiple shared lines.

Shared Line Limitations

The following features are not available or have limitations on phones with shared lines:

- Forwarding an incoming call is not available.
- Ignoring or rejecting an incoming call on shared lines disables ringing only.
- Enabling Do Not Disturb on shared lines disables ringing only and a visual notification of the call is displayed with the option to answer the call.

Answering Calls on Shared Lines

Incoming calls to a shared line cause all registered phones to ring. You can answer the call on any of the registered phones.

When you answer an incoming call, a green indicator light displays on the line key on all phones for the shared line.

Missed and Received Calls on Shared Lines

If no phones answer a shared line call, it displays as missed on all registered phones. When on phone answers the call, no other registered phone displays call as missed.

Your administrator can configure the phone to display answered shared line calls on the received calls list of all phones.

Hold a Call Privately on a Shared Line

You can hold a call privately on a shared line. Using Private Hold places the call on hold and displays the line as busy on the other phones on the shared line.

By default, when you hold a call on a shared line, all of the phones registered with that line display the call's held status. When your administrator enables Private Hold, the **Pvt Hold** softkey displays. You can hold a call privately, transfer a call, or initiate a conference call without notifying others of the call's held state.

Check with your system administrator to find out if this feature is available on your phone.

Procedure

- During a call, press **More** > **Pvt Hold**.

  The call is held on your phone, and the line shows as busy on the other shared line users' phones.

  When you hold a call privately, other users on the shared line cannot resume or pick up the call. However, users on the shared line can barge in on privately held calls. In order to allow other users to resume the call, you have to publicly hold the call by pressing the Hold key or soft key.

  When Private Hold is enabled, you can also transfer a call or initiate a conference call without the other shared line users being notified of the call's status. When you press the Transfer or Conference soft key on the shared line, the call is held privately. If you press Hold before you transfer a call or initiate a conference, the other users on the shared line are notified of the call's held status.

Call Lists and Directories

Topics:

- Recent Calls
- Favorites and Contact Lists
- Contact Directory
- Corporate Directory

All CCX phones support a Recent Calls list, a Contact Directory, and a Corporate Directory.

The phones can also support a BroadSoft Directory and the Ribbon Communications Address Books depending on your server and if enabled by your system administrator.

Note: Your phone may not support all of the features described in this section. Check with your system administrator to find out which features are available on your device.

Recent Calls

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

Perform the following tasks from the Recent Calls list:

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

View Recent Calls

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

Procedure

» Do one of the following:

- Go to **Contacts** > **Recent Calls**.
- Select **Recent Calls** in the status bar.

Sort Recent Call Entries

You can sort the Recent Calls list to view calls by call type, time, and call name.

When you sort calls by the time of the call, you can order them in ascending (oldest call first) or descending (most recent call first) order. When you sort calls by name, you can order them in ascending (alphabetical) or descending (reverse-alphabetical) order.

Procedure

1. Select **Sort** .

2. Under **Sort**, choose **Time** or **Name**.
3. Under **Order**, choose **Ascending** or **Descending**.

Sort Entries by Call Type

When you filter calls, you can choose to display only missed, received, or placed calls. You can also choose to display all call types (the default).

Note: You cannot save your filtered call list results. If you filter your Recent Calls list so that only a certain call type displays, the next time you display the list, all call types display in the default filter.

Procedure

1. Select **Type**.
2. Choose **Missed Calls**, **Received Calls**, or **Placed Calls**.

View Call Details

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

Procedure

» Select **Info** ⓘ next to a call record.

Edit a Recent Call Entry

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

Procedure

1. Select **Info** ⓘ next to a call record.
2. Select **Edit**.
3. Edit the number and select **Dial**.

Delete a Recent Call Entry

Delete any recent call entry from the Recent Calls list.

Procedure

1. Select **Info** ⓘ next to a call record.
2. Select **Delete**.

Save a Recent Call Entry

You can save a recent call entry to the Contact Directory.

Procedure

1. Select **Info** ⓘ next to a call record.

2. From the **Call Details** screen, select **Add to Contacts**.
3. To make the saved content a favorite, select **Favorite**.

Favorites and Contact Lists

You can add contacts as favorites, view and manage BroadSoft UC-One contacts, and watch contacts in your Buddy list.

Note: Your phone may not support all of the features described in this section. Check with your system administrator to find out which features are available on your phone.

Managing Favorites

Favorites are the contacts in your Contact Directory that you will call most often. You can add contacts as favorites from the Contact Directory, designate an index number for favorites, view favorites on the Home or Lines screen depending on your phone, and delete favorites.

Add Favorites

Add a contact to your favorites list when you add them to your contact list or from your call log.

Note: When you add a contact to your contact list, the phone adds them to favorites.

Procedure

1. Choose from:
   - From the home screen, select **Contacts.**
   - Select **Menu** > **Contacts**.
2. Select the information icon next to the contact ⓘ.
3. From the Contact Card banner, select the star.

Viewing Favorites

You can view favorites in the Favorites list in the Directory or the New Call screen. Favorites display consecutively according to their index number. The contact with the lowest number is displays first.

View Favorites

View favorites in the Favorites lists on the New Call screen.

Procedure

» Select **New Call** > **Favorites**.

View Favorites on the Home Screen

From the home screen, select a favorite to view their details.

Procedure

» From the **Home** screen, select a favorite.

View Favorites from the Lines Screen

You can view a list of favorites on the Lines screen.

Procedure

» From the **Home** screen, press Home .

Reorder Favorites

You can change the order in which your favorites display on the Home or Lines screen.

Procedure

1. From your **Contact Directory**, select a contact.
2. On the **Contact Information** screen, select **Edit** .
3. From the **Edit Contact** screen, select **Favorite Index** and enter a new favorite index number.
4. Select **Save**.

Delete Favorites

You can delete favorites to make room for new favorites.

Procedure

1. In the **Contact Directory**, select a contact.
2. On the **Contact Information** screen, select **Edit** .
3. From the **Edit Contact** screen, select **Favorite Index**, and delete the favorite index number.
4. Select **Save**.

Tip: To quickly delete a contact, on the Lines screen, press and hold the favorite until the Contact Information screen is displayed. Select **Delete**. The contact remains in your directory, but is no longer a favorite.

Using Buddy Lists

A Buddy list is a list of users whose status or presence you can monitor. Users can update their presence setting to a status such as “Be right back”, “Out to lunch”, or “Busy”, and you can view their status in real time from your Buddy list. You can also view your buddies' status from the Lines and Home screens, if your buddy is a favorite.

Add Contacts to Your Buddy List

If you want to monitor contacts' status, add them to your Buddy list.

You add people to your Buddy list from your Contact Directory, so you must first add them to your Contact Directory before adding them to your Buddy list.

Procedure

1. In the **Contact Directory**, select a contact.
2. On the **Contact Information** screen, select **Edit** .
3. From the **Edit Contact** screen, select **Watch Buddy** > **Enabled**.

The default setting is Disabled. When enabled, the contact is added to your Buddy list so you can monitor the contact's status.

4. Select **Save**.

View Your Buddy List

When you enable the Watch Buddy setting for a contact, the contact is displayed in your Buddy list.

Procedure

» From the Lines screen, select **Buddies**.

Tip: You can quickly dial a buddy from your Buddy list. From the Lines screen, select **Buddies**, select the buddy you want to call, and select **Dial** .

Monitor Contacts on Your Buddy List

View the status of contacts on your Buddy list. If a buddy is a favorite, you can also monitor the buddy from the Home and Lines screen.

Procedure

» Do one of the following:

- Select **Buddies** or go to **Settings** > **Features** > **Presence** > **Buddy Status**.
- Press the Home key to go to the Lines screen.

Buddies' Presence Information

Your buddies display an icon next to their name to indicate their status.

The following table shows the general icons and the status they represent.

Buddy Status and Icons

Buddy Status	Icon
Available	
Busy	
Away	
Do Not Disturb	
Offline	

View Your Watcher List

Contacts who can monitor your phone's status are added to the Watcher list.

Procedure

1. Go to **Settings** > **Features** > **Presence**.

A list of contacts that can monitor your status is displayed.

2. Select **Watcher List**.

Block Contacts from Viewing Your Status

You can prevent someone from monitoring you by blocking the contact in your Contact Directory.

If you unblock the contact, the contact can add you to their Buddy list and monitor you.

Procedure

1. In the **Contact Directory**, select a contact.
2. On the **Contact Information** screen, select **Edit** .
3. From the **Edit Contact** screen, select **Block Buddy** > **Enabled**.

   The default setting is Disabled. When enabled, the contact cannot watch your status, and the contact is displayed in your Blocked List.
4. Select **Save**.

View a List of Blocked Contacts

Contacts who cannot monitor your phone's status are added to the Blocked List.

Procedure

1. Go to **Settings** > **Features** > **Presence**.

   A list of contacts that cannot monitor your status is displayed.
2. Select **Blocked List**.

Unblock a Contact

From the Blocked list, you can unblock contacts and allow them to monitor your phone's status.

Procedure

1. Go to **Settings** > **Features** > **Presence**.
2. Select **Blocked List**.
3. From the **Blocked List** screen, select a contact.
4. Select **Unblock**.

   The contact can now monitor your status and is displayed in the Watcher list.

Contact Directory

You can store a large number of contacts in the Contact Directory, as well as add additional contacts, view and update a contact's information, and delete contacts from the directory.

Contact your system administrator for the exact number of contacts you can store in the Contact Directory for your phone model.

Note: If you cannot add or edit contacts in the Contact Directory, your system administrator has set the directory as read-only. Contact your system administrator for assistance making any changes to the contacts stored in the directory.

Search for Contacts

You can search for your desired contact in the Contact Directory.

Procedure

» In the contact directory, enter your contact's name in to the search field.

Your contact list filters based on the text entered.

Add a Contact to the Contact Directory

When you add a contact to your Contact directory, you can choose how much information you want to enter for your contact. The phone requires you to enter a contact number.

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

- First and Last Name—The name of your contact
- Contact—Your contact's phone number
- Job Title—Your contact's position
- Email—Your contact’s personal or work email address
- Favorite Index—An index number that displays in your Favorites list
- Label—A label or title for your contact

Note: If your phone doesn’t display all of these contact fields, contact your system administrator. The only required field in the contact directory is the **Contact** field, which includes the contact’s phone number.

Procedure

1. Go to **Directories** > **Contact Directory** .
2. In the **Contact Directory**, select **Add** or the **Add** + icon.
3. On the **Add Contact** screen, enter your contact's information in the available fields.

   You only have to enter a phone number in the **Contact** field to add a new contact to the directory. You can choose to enter additional information.
4. Select **Save**.

View Contact Information

From your Contact Directory, you can view information, such as name and phone number, for any contacts saved to the directory. You can also view additional information, such as a job title, label, or email address.

Procedure

1. Go to **Directories** > **Contact Directory** .
2. In the **Contact Directory**, select a contact.

Update a Contact's Information

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

Procedure

1. In the **Contact Directory**, select a contact.
2. On the **Contact Information** screen, select **Edit** .
3. On the **Edit Contact** screen, update the contact's information.
4. Select **Save**.

Delete a Contact from the Contact Directory

You can delete any contact from the Contact Directory.

Procedure

1. From the home screen, go to **Contacts** or select **Menu** > **Contacts**.
2. In the **Contact Directory**, select a contact.
3. On the **Contact Information** screen, select **Delete** .

   A confirmation message displays.
4. Select **Yes** to delete the contact.

Corporate Directory

Your system administrator can set up your phone so that you can access a corporate directory, which lists contacts and groups within your company.

However, you can't update the corporate directory, and your system administrator determines which contacts you can see. Check with your system administrator to find out if this feature is available.

Note: You may need to enter your user credentials to access the directory for the first time, if set by your system administrator.

Searching the Corporate Directory

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

Search the Corporate Directory

You can search for contacts in the Corporate Directory using either their first name or last name.

Procedure

1. From the home screen, go to **Contacts** or select **Menu** > **Contacts**.
2. In the search field, enter your search criteria and select **Submit**.
3. Choose a contact and select **View** to view the contact's information.

Perform an Advanced Search of the Corporate Directory

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

Procedure

1. Go to **Directories** > **Corporate Directory**.
2. In the **Corporate Directory**, select **AdvFind**.
3. In the search field, enter your search criteria and select **Submit**.
4. Choose a contact and select **View** to view the contact's information.

Save Corporate Directory Search Results

Save your last search results if you would like to see them displayed in the Corporate Directory the next time you view it.

Procedure

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Corporate Directory** > **View Persistency** and select **Enabled**.

   Each time you view the Corporate Directory, your last search results automatically display.

Clear Corporate Directory Search Results

After you search for a contact, you can clear your search results and start a new search.

Procedure

- On the **Search** screen, select **Clear**.

Add Corporate Directory Contacts to the Local Directory

You can add contacts in the corporate directory to the Contact Directory.

When you save a corporate directory contact to the Contact Directory, the first name, last name, and phone number of the contact automatically save to the directory. You can add additional contact information the contact in the directory afterward.

Procedure

1. In the **Corporate Directory**, search for a contact.
2. From the search results, choose the contact and select **View**.
3. Select **Save**.
4. Enter any additional contact information and select **Save**.

Accessing, Sending, and Broadcasting Messages

Topics:

- Accessing Voicemail
- Instant Messaging
- Broadcasting Messages with Group Paging
- Broadcasting Messages with Push to Talk

You can access, send, and broadcast a variety of message types.

Note: Your phone may not support all of the features described in this section. Check with your system administrator to find out which features are available on your phone.

Accessing Voicemail

Your phone indicates when you have new voicemail in the following ways:

- The message icon displays with the number of new messages:
  - On the Home screen.
  - In the status bar.
  - Next to the phone line on the Lines screen.
- The message waiting indicator LED flashes.
- The phone plays an audible alert.

Note: Contact your system administrator or service provider for information on setting or changing your voicemail greeting.

Access Voicemail Messages

Check your voicemail in the Message Center on your phone.

Note: For information on remotely accessing your voicemail, contact your system administrator or service provider.

Procedure

1. Go to **Messages**.
2. Select **Message Center**.
3. If you have multiple lines on your phone, select the line that has the new message.
4. From the **Messages** screen, select **Connect** and follow the prompts to access your messages.

Remove the Message Alert

If you are not ready to listen to your messages when you receive new messages, you can temporarily remove the message alert.

Procedure

1. Go to **Messages**.
2. Select **Message Center**.
3. Select **Clear**.

   All message indicators are removed for approximately one to two hours.

Instant Messaging

You can send and receive instant messages from your phone to other phones on your network.

Instant messaging is an optional feature. Contact your system administrator to find out whether instant messaging is enabled on your phone.

Send Instant Messages

When you send a message, you can either select a message from a preset list of short messages, or you can use the dial pad or onscreen keyboard to enter a custom message.

Procedure

1. Go to **Messages**.
2. Select **Instant Messages**.
3. If you have multiple lines on your phone, select a line.
4. From the **Instant Messages** screen, select the **New** soft key.
5. Enter a contact's phone number, URL, or IP address and select **OK**.

   The phone number, URL, or IP address you entered is displayed on the screen.
6. Do one of the following:
   - Press **Select** to choose a pre-scripted message from the **Message Select** screen.
   - Select **Edit** to compose a custom message, and enter your message.
7. Select **Send**.

Read Instant Messages

Instant messages display in the order they are received with the first message received displaying first.

Procedure

1. Go to **Messages**.
2. Select **Instant Messages**.
3. If you have multiple lines on your phone, select a line.

   The first message received is displayed.
4. Select the **Next** or **Previous** soft key to read additional messages, if available.

Reply to Instant Messages

After you read an instant message on your phone, you can send a reply to the message.

Procedure

1. Go to **Messages**.
2. Select **Instant Messages**.
3. From the **Instant Messages** screen, select a message and select **Reply**.
4. Enter a message and select **Send**.

Delete Instant Messages

You can choose to delete instant messages from your phone.

Procedure

1. Go to **Messages**.
2. Select **Instant Messages**.
3. Select a message and select **Delete**.

Broadcasting Messages with Group Paging

Group Paging enables you to send pages—one-way audio announcements—to contacts subscribed to a page group.

Your administrator can enable a broadcast mode called Group Paging mode. In this mode, you can broadcast one-way announcements to a specified group of phones, called a Paging Group.

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

Each group has one of the following priorities:

- Normal—By default, broadcasts sent to groups 1 to 23 are considered Normal broadcasts. By default, all phones are configured to receive broadcasts sent to group 1.
- Priority—By default, broadcasts sent to group 24 are considered Priority broadcasts. A Priority broadcast interrupts Normal broadcasts or active calls. All phones receive Priority broadcasts unless Do Not Disturb is enabled.
- Emergency—By default, broadcasts sent to group 25 are considered Emergency broadcasts. An Emergency broadcast interrupts Normal broadcasts, Priority broadcasts, and active calls and plays out at near maximum volume even if Do Not Disturb is enabled.

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

Send a Group Page

When you send a group page without selecting a page group, it is automatically sent to the default paging group, which is group 1. You cannot send a page while you are in an active call.

Procedure

1. From the Lines screen, select the **Paging** soft key.
2. From the **Paging Groups** screen, select a paging group.
3. To begin a page, select **Page**.

   Just before the page starts, you'll hear an alert tone, and then the page begins.
4. Begin speaking.
5. To end the page, select **End Page**.

Receiving Pages

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

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

When you enable Do Not Disturb on your phone, you receive only Emergency broadcasts. Non-emergency broadcasts do not display or play on your phone.

Listen to a Page During an Active Call

Pages received during an active call defer or automatically play depending on the page priority.

Pages received during an active call don't interrupt the call. The phone plays audio from both the call and the page at the same time. When you receive a page during a call:

- If configured by your administrator, standard priority pages play during active calls. Otherwise, the page displays on your phone as pending.
- Priority and emergency pages play immediately.

Note: If you adjust the volume of a normal, nonemergency page while it plays, the phone uses the adjusted volume for all subsequent nonemergency pages. However, only your system administrator can change the volume of an emergency page.

Procedure

» Do one of the following:

- For normal pages that play automatically during a call, hold the call to hear only the page.
- For pending pages, select **Accept** or hold the call to listen to the page.

Receiving Pages When Not in an Active Call

When you receive a page and you aren’t in an active call, the page immediately plays, regardless of the paging priority.

While a page plays, you can do the following:

- Hold the page.
- End the page. This ends the page at your phone only.
- Place a new call.

Group Paging Settings

You can change your default paging group, update page group subscriptions, and enable pages to play during active calls on your phone.

Note: The features described in this section require access to the Basic settings menu on the phone. If your phone requires a password to access the Basic settings menu, contact your system administrator for assistance customizing your phone.

Change the Default Paging Group

You can change the default paging group to any group you want.

The default paging group is group 1. If you change the default paging group, you are automatically subscribed to the group you selected.

Procedure

1. Go to **Settings** > **Basic** > **Preferences** > **Paging/PTT Configuration**.
2. Select **Group Paging** > **Default Group**, and select a new paging group number.

   When you press Paging, your phone sends pages using the new group.

Update Paging Group Subscriptions

By default, you are subscribed to Paging Groups 1, 24, and 25. This means that you can send pages to and receive pages sent from these groups. You can change which groups you are subscribed to. However, you cannot disable your subscriptions to Paging Groups 24 and 25.

Procedure

1. Go to **Settings** > **Basic** > **Preferences** > **Paging/PTT Configuration**.
2. Select **Group Paging** > **Group Subscriptions**.
3. From the **Group Subscriptions** screen, select the group you want to subscribe to and select **Yes**.

Enable Pages to Play during Active Calls

The Accept While Busy setting determines what happens when you are in a call and receive a page. This setting is disabled by default. When disabled, the incoming page is held in a pending state, it does not disrupt the call, and you cannot hear the page.

When you enable the Accept While Busy setting, a page interrupts calls and you hear the audio of the call and the page.

Procedure

1. Go to **Settings** > **Basic** > **Preferences** > **Paging/PTT Configuration**.
2. Select **Group Paging** > **Accept While Busy** and select **Enable** or **Disable**.

Broadcasting Messages with Push to Talk

The Push to Talk (PTT) feature enables you to transmit messages and listen to replies much like a walkie-talkie.

Your system administrator sets up the feature, defines up to 25 channels for PTT mode, and assigns a label to each channel that easily identifies the channel, such as All, HR Dept, Shipping Staff, or Executives. By default, you are subscribed to Channels 1, 24, and 25. This means that you can send and receive PTT broadcasts on Channels 1, 24, and 25.

Each group or channel has one of the following priorities:

- Normal—By default, broadcasts sent to channels 1 to 23 are considered Normal broadcasts. If two users begin a broadcast on the same group/channel at the same time, the phone with the lower serial number continues to transmit while the other phone enters the receiving state. By default, all phones are configured to receive broadcasts sent to channel 1.
- Priority—By default, broadcasts sent to channel 24 are considered Priority broadcasts. A Priority broadcast interrupts Normal broadcasts or active calls. All phones receive Priority broadcasts unless Do Not Disturb is enabled. Phones play Priority broadcasts at the phone's current audio level.
- Emergency—By default, broadcasts sent to channel 25 are considered Emergency broadcasts. An Emergency broadcast interrupts Normal broadcasts, Priority broadcasts, and active calls and plays out at near maximum volume even if Do Not Disturb is enabled.

Send a PTT Broadcast

You can choose a channel to broadcast on before you send a PTT broadcast, or you can hold the Talk soft key to immediately begin broadcasting on Channel 1, the default channel.

While you send a broadcast, you can pick up the handset, or press the Speakerphone or Headset key and continue speaking. You can also press the Mute key to mute your audio so the people receiving your broadcast do not hear anything. This behavior is similar to a phone call.

Tip: To automatically send a PTT broadcast on the default channel, press and hold **Talk**. After the transmitting beep, begin speaking.

Procedure

1. Select **Talk**.
2. From the **PTT Channels** screen, select a channel.

   A list is displayed with the default channel, the most recent channel you sent a broadcast on, and other channels you can broadcast on.
3. Press and hold **Talk** to start the broadcast.

   Be sure to hold **Talk** throughout the entire broadcast.

   A transmitting beep plays and the phone displays the channel information.
4. Begin speaking.
5. When you finish your broadcast, do one of the following:
   - Release **Talk**.

     When you release Talk while sending the broadcast, the broadcast temporarily stops and enters a 10-second waiting period. During this period, the channel remains open to give

others a chance to reply. At any time during the waiting period, you can resume your broadcast by pressing and holding Talk. If no one broadcasts during the waiting period, the channel closes and the broadcast ends.

- Select **End PTT**.

  After you select End PTT, you can immediately initiate another broadcast on another channel, even if the previous broadcast is in the waiting period.

Receiving PTT Broadcasts

To receive a broadcast sent on a particular channel, you need to be subscribed to that channel.

How you receive a PTT broadcast depends on the broadcast priority, whether you are in an active call, and whether your phone is set up to receive broadcasts during active calls.

When you enable Do Not Disturb on your phone, you receive only Emergency broadcasts. Non-emergency broadcasts do not display or play on your phone.

Listen to a PTT Broadcast during an Active Call

How you handle a broadcast when you are in an active call depends on the broadcast priority and if your phone is set up to receive a broadcast when you are in an active call.

The following occurs when you receive a broadcast during an active call:

- When your phone is set up to receive Normal broadcasts during an active call, the broadcast immediately plays. You hear both the active call and the broadcast.
- When your phone is not set up to receive broadcasts during active calls, the broadcast is displayed as a Pending broadcast.
- When the broadcast is a Priority or Emergency broadcast, the broadcast plays immediately. You hear the active call and the broadcast.

Procedure

» Do one of the following,

- For broadcasts that play automatically during a call, hold the call to hear only the broadcast.
- For Pending broadcasts, select **Accept** or hold the call.

Receiving PTT Broadcasts When Not in an Active Call

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

When you adjust the volume of a non-emergency broadcast, your phone retains the adjusted volume for all subsequent non-emergency broadcasts. However, only system administrators can adjust the volume level of an Emergency broadcast.

Reply to PTT Broadcasts

When a broadcast ends, the broadcast enters a 10-second waiting period. During this period, the channel remains open to receive or send additional broadcasts.

Procedure

1. During the 10-second waiting period, press and hold **Talk**.
2. Begin talking.

The broadcast is sent to all people listening on the channel.

3. When you finish talking, release **Talk**.

   The broadcast enters another waiting period until someone broadcasts again. If no activity occurs within the waiting period, the channel closes and no more broadcasts can take place.

End PTT Broadcasts

After you end a broadcast, the channel remains open so others can respond.

Procedure

» Do one of the following:

- Release **Talk**.

  The broadcast enters a waiting period. You can initiate another broadcast on another channel when the waiting period ends.

- Select **End PTT**.

  The broadcast ends. You cannot resume the broadcast by pressing and holding Talk on the same channel. You can immediately initiate another broadcast on another channel.

Push To Talk Settings

This section provides information on changing your default channel, updating channel subscriptions, and enabling broadcasts to play during active calls.

Note: The features described in this section require access to the Basic settings menu on the phone. If your phone requires a password to access the Basic settings menu, contact your system administrator for assistance customizing your phone.

Change the Default Channel

When you press and hold Talk, your broadcast automatically transmits on the default channel 1. You can change your default channel to any other channel. When you change the default channel, you are automatically subscribed to the channel you selected.

Procedure

1. Go to **Settings** > **Basic** > **Preferences** > **Paging/PTT Configuration**.
2. Select **PTT Push to Talk** > **Default Channel** and select the number of the channel you want to use.

Update Channel Subscriptions

You can subscribe to any channel that has been enabled by your system administrator and appears in your channels list.

When you subscribe to a channel, you can send and receive PTT broadcasts on that channel.

Procedure

1. Go to **Settings** > **Basic** > **Preferences** > **Paging/PTT Configuration**.
2. Select **PTT Push to Talk** > **Channel Subscriptions**.

3. From the **Channel Subscriptions** screen, select the channel you want to subscribe to and select **Yes**.

Enable PTT Broadcasts to Play During Active Calls

The Accept While Busy setting determines what happens when you are in a call and receive a PTT broadcast. The setting is disabled by default, and when disabled, your phone does not play broadcasts while you are in a call but holds them in a pending state instead. When you enable the Accept While Busy setting, a PTT broadcast interrupts active calls and you hear the audio of the call and the broadcast.

Procedure

1. Go to **Settings** > **Basic** > **Preferences** > **Paging/PTT Configuration**.
2. Select **PTT Push to Talk** > **Accept While Busy** and select **Enable**.

Poly CCX Phone Settings

Topics:

- Password Required to Access Basic Settings
- Set the System Language
- Disable Call Waiting
- Time and Date Display
- Backlight Intensity and Timeout
- Changing Your Background
- Screen Savers
- Use Your Phone as a Digital Picture Frame
- Power Saving Mode
- Changing Audio Settings
- Updating Your Buddy Status
- Security Classification
- Clear Call Logs and Contacts
- Restrict Call Log and Contact Uploads

You can make some basic customizations on the phone, which includes changing the time and date format, setting a language, and adjusting the screen brightness.

Password Required to Access Basic Settings

You may need a password to configure basic settings on your phone.

You can enable or customize your phone from the **Basic** settings menu. However, your system administrator may require a password to access the settings menu. If your phone requires a password to access the settings menu, contact your system administrator for assistance.

Set the System Language

Poly phones support several languages that you can choose to display on the phone.

Check with your system administrator to find out which languages your phone supports.

Procedure

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Language** and select a language.

   The language on the phone updates immediately.

Disable Call Waiting

The Call Waiting feature is enabled by default. If enabled by your system administrator, you can disable Call Waiting.

If you disable Call Waiting, any incoming calls received on your phone while you are in a call are automatically sent to voicemail.

Procedure

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Call Waiting** and select **Disable**.

Time and Date Display

The time and date display in the status bar.

When the phone can't 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.

Change the Time and Date Format

Customize the time and date by choosing between several time and date formats, including options to display the day, month, or year.

Procedure

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Time and Date** and choose one of the following:
   - Select **Clock Date** to change the date format.
   - Select **Clock Time** to change the time format.

Disable the Time and Date Display

If desired, turn off the time and date display.

Procedure

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Time and Date** and select **Disable**.

Backlight Intensity and Timeout

If desired, change settings for the following backlight components:

- Backlight Intensity—The brightness of the screen during phone activity and inactivity.
- Backlight Timeout—The number of seconds the phone is inactive before the backlight dims to its Backlight Idle intensity. The backlight timeout period begins after your last activity, such as an incoming call.

Backlight Intensity includes the following settings you can choose from:

- Backlight On—The brightness of the screen when there’s activity.
- Backlight Idle—The brightness of the screen when there’s no activity.
- Maximum Intensity—The brightness scale that applies to both Backlight On and Backlight Idle intensities.

Set the Backlight Intensity

The screen's backlight intensity settings adjust how bright the screen illuminates while on and while idle.

Set the **Backlight On** intensity and the **Backlight Idle** intensity separately. Choose an intensity level or turn off the backlight entirely. When you change the **Maximum Intensity**, you modify the entire backlight intensity scale. For example, if you decrease the **Maximum Intensity**, the **Low**, **Medium**, and **High** levels for both **Backlight On** and **Backlight Idle** intensities decrease.

Procedure

1. Go to **Settings** > **Basic**.
2. Select **Backlight Intensity** > **Backlight On Intensity**.
3. Select the intensity you want, and select **Back**.
4. From the **Backlight Intensity** screen, select **Backlight Idle Intensity**.
5. Select the intensity you want, and select **Back**.
6. From the **Backlight Intensity** screen, select **Maximum Intensity**.
7. Select **Up** or **Down** to increase or decrease the maximum intensity.

Set the Backlight Timeout

The backlight automatically turns on with any phone activity.

By setting the **Backlight Timeout**, you can determine how long the phone should sit idle before the backlight dims to its **Backlight Idle** intensity. By default, the backlight dims after the phone is idle for 40 seconds.

Procedure

1. Go to **Settings** > **Basic**.
2. Select **Backlight Timeout**.
3. Choose the number of seconds the phone is idle before the backlight dims.

Changing Your Background

You can change the background picture that is displayed on your phone to any image set up by your system administrator.

By default, your screen displays a blue background named Default. If no background images are set up, only the Default is available.

You can also add personal photos on your phone using the Web Configuration Utility or a USB flash drive.

Change the Background Picture

If your system administrator has pre-loaded your phone with background pictures or you have added personal photos onto the phone, you can choose to display a background other than the default.

Procedure

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Background** and select a background image.

   Depending how your system is set up, you might have to select **Background** > **Select Background**. The **Select Background** screen is displayed.

Adding Personal Photos as Your Background

You can upload a personal photo to use as your background using the Web Configuration Utility or using a USB flash drive. When you set one of your photos as the background picture, the picture is displayed as **Local File** in the Backgrounds list.

Keep in mind the following when you use a personal photo as the background image:

- Progressive or multiscan JPEG images are not supported.
- Smaller images are centered and surrounded with black space.
- Larger images are scaled proportionally to fit the screen.
- Horizontal or vertical black bars are added to preserve the original aspect ratio.

Add a Background Using the System Web Interface

You can add one or multiple images for your phone background using the system web interface.

Procedure

1. Find you phone’s IP address, go to **Settings** > **Status** > **Platform** > **Phone**.
2. Enter your phone's IP address into the web browser on your computer.
3. Select **User** and enter your assigned password or the default (**123**) password.
4. From the menu bar, select **Preferences** > **Background**.
5. Click **+ Add a new background image**.
6. Click **Select a file from PC/Desktop**, and click **Choose File for Phone Image**.
7. Choose your picture file and click **Open**.
8. Click **Save**.

   The phone adds the file to the list of available backgrounds.
9. Go to **Settings** > **Basic** > **Preferences**.
10. Select **Background** and select a background image.

    The image displays as your background.

Use a USB Flash Drive to Add a Background

You can add personal photos as your background using a USB drive.

Before you can set a photo on your USB flash drive as the background picture, make sure the photo is on a USB flash drive and is not in a folder on the drive.

Note: If your phone doesn’t detect the USB device when you insert it into the USB port, the USB port on your phone may be disabled. Contact your system administrator for assistance using the USB port.

Procedure

1. Attach a USB flash drive to the USB port on your phone.
2. Navigate to **Settings** > **Features** > **Removable Storage Media** > **Picture Frame**.

   Your pictures display one-by-one.
3. Use the arrow keys to find your picture and then select the **Set Background** icon .

   The picture you selected is displayed on the Home and Lines screens.

Note: If your pictures on the flash drive are in a subfolder and not in the root directory, the phone displays a message stating that there are no available photos. Make sure the picture you want to display on your phone is not in a subfolder on the flash drive.

Reset Your Background

You can reset your background to display the default image.

Procedure

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Background** > **Default**.

Screen Savers

Another way to personalize your phone is to enable a screen saver that can either show default pictures stored on your phone, the idle browser, or pictures stored on a USB flash drive.

Ask your system administrator if this feature is available on your phone.

Enable Screen Savers

When you enable the screen saver, you can choose to have your phone display default photos stored on the phone or photos stored on a connected USB flash drive.

The screen saver automatically starts when your phone is idle for a specified amount of time. You can stop the screen saver at any time by pressing any key or touching the screen.

Procedure

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Screen Saver** > **Screen Saver** screen and select **Enabled**.
3. Select **Wait Time** and enter the number of minutes the phone should wait after no activity before displaying the screen saver.

   Enter a time between 1 and 9999 minutes. The default is 15 minutes.
4. Select **Type** and select either **Default** or **Idle Browser**.
5. Select **Save**.

Use Personal Photos as Screen Savers

You can enable your phone to display your personal photos on a USB flash drive as a screen saver.

To set up a screen saver of your photos, you must set up certain screen saver settings, place your photos on a USB flash drive, and attach the USB flash drive to the phone.

The photos you use must have the following file type and size properties:

- File type: BMP, JPEG, or PNG
- Maximum size: 9999 x 9999 pixels

The phone can only display the photos as your screen saver when the USB flash drive is attached to the phone. You can set up your phone to use a single photo to display or have all photos display in slide-show style. This is an alternative to setting up a screen saver, and it automatically starts each time your phone is idle a certain amount of time.

Procedure

1. Place one or more photos onto a USB flash drive, either in the root directory or in a folder.
2. Attach the USB flash drive to your phone.

   The USB icon is displayed on the status bar.
3. Go to **Settings** > **Basic** > **Preferences**.
4. Select **Picture Frame** > **Folder**, and enter the name of the folder you placed your photos in on the USB flash drive.

   If you placed the photos in the root directory of your USB flash drive instead of a folder, do not enter a folder name.
5. Select **Time Per Image**, and enter the number of seconds you want each photo to display.

   You can enter a minimum of 3 seconds and a maximum of 300 seconds. The default is 5 seconds.
6. Select **Save**.

   If the message “No pictures found” displays after you select **Save**, there are no photos in the folder you specified or in the root directory. Go back and make sure the information you entered is correct.
7. Go to **Settings** > **Basic** > **Preferences**.
8. Select **Screen Saver** > **Screen Saver** screen and select **Enabled**.
9. Select **Wait Time** and enter the number of minutes the phone should wait after no activity before displaying the screen saver.

   Enter a time between 1 and 9999 minutes. The default is 15 minutes.
10. Select **Save**.

    Your phone displays the screen saver after the number of minutes you specified in the Wait Time field.

Note: If your phone doesn’t detect the USB device when you insert it into the USB port, the USB port on your phone may be disabled. Contact your system administrator for assistance using the USB port.

Disable the Screen Saver

You can stop a screen saver at any time by touching the screen. After your phone is idle for the specified period of time, the screen saver starts again.

You can disable a screen saver—prevent it from starting, even if your phone has been idle for the specified period of time—by doing the following:

- Disabling the Screen Saver setting. When you disable the setting, the screen saver does not display, even though the USB flash drive is still attached.
- Removing the USB flash drive. The screen saver does not display until you attach the USB flash drive again and your phone is idle for the period of time you specified.

Procedure

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Screen Saver** > **Screen Saver** then select **Disabled**.
3. Select **Save**.

Use Your Phone as a Digital Picture Frame

You can use the picture frame feature on your phone to view pictures stored on your USB flash drive at any time without setting up a screen saver. You can display your pictures as thumbnails, as a slide show, or a single picture.

Before you can display your pictures, confirm that your pictures are on the USB flash drive and that the USB flash drive is attached to your phone.

Note: If your phone does not detect the USB flash drive when you attach it to your phone, the USB port on your phone may be disabled. Contact your system administrator.

Procedure

» Select **Settings** > **Features** > **Removable Storage Media** > **Picture Frame**.

Picture Frame Icons

Use the icons in the following table to perform actions in the Picture Frame.

Picture Frame Icons

Icon	Label	Action
	Thumbnail	View thumbnails of your pictures.
←	Back	View the previous picture.
→	Forward	View the next picture.
	Pause	Pause and display the current picture only.
▶	Start	Starts the display of pictures one-by-one again.
×	Stop	Stop displaying the pictures. The pictures do not display again until you access the Picture Frame feature (unless you have a screen saver enabled).

	Background Image	Set the picture that currently displays as the background picture for your phone.

Power Saving Mode

By default, Poly phones enter power saving mode and turn off the screen after being idle for a certain period of time to conserve energy.

You can determine the period of time that the phone is idle before the screen turns off, and you can set different idle timeouts for office hours and off hours, such as evenings and weekends. The phone exits power saving mode if an event occurs—for example, if there is an incoming call or message. If you enable a screen saver, power saving mode still activates.

You can update the following power-saving settings:

- **Office Hours**: When you start work and how long you're in the office each day.
- **Timeouts**: The period of time the phone is idle before the screen turns off.

Change Your Office Hours for Power Saving Mode

When you update your office hours, you specify when you start and how long you work each day. After your work hours, the phone is idle and goes into power saving mode.

Procedure

1. Go to **Basic** settings.
2. Select **Power Saving** > **Office Hours** and select **Start Hour**.
3. Select a day of the week, and using the 24-hour clock, enter a start time from 0 to 23.
4. Select **Save**.
5. On the **Office Hours** screen, select **Duration**.
6. Select a day of the week and enter a duration of 0 to 12 hours per day.
7. Select **Save**.

Change Idle Timeouts for Power Saving Mode

Update the period of time the phone is idle before the screen turns off.

You can specify different timeouts for office hours and nonoffice hours. By default, the setting for office hours is much longer than the setting for nonoffice hours.

You can also specify the amount of time the phone waits to go idle after you press a key or tap the screen (on touchscreen models). You can choose to set this time period longer than the other idle timeouts. This prevents power saving mode initiating when you use the phone.

Tip: Once you press a key or tap the screen (on touchscreen models), the phone uses the idle timeout period with the highest value.

Procedure

1. Go to **Basic** > **Power Saving** > **Timeouts**.
2. Configure the following options:

- **Office Hours Idle Timeout**: The number of minutes (1 to 600) the phone waits during office hours before starting power saving mode.
- **Off Hours Idle Timeout**: The number of minutes (1 to 10) the phone waits during nonoffice hours before starting power saving mode.
- **User Input Idle Timeout**: The number of minutes (1 to 10) the phone waits after you press a key or tap the screen before starting power saving mode.

3. Select **Save**.

Changing Audio Settings

You control certain audio settings on your phone, including the ringtone for incoming calls from all contacts or a specific contact, where call notifications play, and the volume of the ringtone or call audio.

Change Incoming Call Notifications

You can choose whether you hear sound effects—all phone sounds except call audio—from the handset, headset, speaker, or the active audio device you set.

You can configure your phone to ring on your headset instead of the speaker. By default, you hear all sound effects from the speaker.

Procedure

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Audible Ringer** and select a location to hear sound effects.

Set a Ringtone for Incoming Calls

One way to personalize your phone is to change the ringtone. You can pick unique ringtones for the different lines on the phone. The default ringtone is **Low Trill**.

Procedure

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Ring Type**.
3. On the **Ring Type** screen, select a ringtone.
4. Optional: Select **Play** to hear the ringtone.

Set a Ringtone for Individual Contacts

To help you quickly identify callers, select unique ringtones for contacts in your directory.

Procedure

1. Go to **Directories** > **Contact Directory** .
2. In the **Contact Directory**, select a contact.
3. On the **Contact Information** screen, select **Edit** .
4. From the **Edit Contact** screen, select **Ring Type** and select a ringtone.
5. Select **Play** to hear the ringtone.
6. Select **Save**.

Change the Volume

If necessary, increase the volume of your ringtone and the audio during a call.

Procedure

- **»** Press one of the Volume keys to increase or decrease the audio.

Updating Your Buddy Status

Poly phones enable you to sign into and update your presence status on your phone to let contacts know when you are busy or available.

You can update your status to one of the following:

- Online
- Busy
- Be right back
- Away
- On the phone
- Out to lunch
- Do not disturb

Your phone also sends certain status information automatically to the people watching you—such as if you are in a call, if you enabled Do Not Disturb on your phone, or if your phone is offline because you restarted it.

Update Your Buddy Status

You can update your status on your phone so that contacts can monitor your status from their phones.

Your updated status is displayed in the status bar on your phone, and your contacts are automatically notified of your new status.

Note: If your status is set to Do Not Disturb, when you enable then disable the Do Not Disturb feature on your phone, your status changes to Online.

Procedure

1. Select **My Status** or navigate to **Settings** > **Features** > **Presence** > **My Status**.
2. From the **My Status** screen, select your desired status.

Automatically Update Your Buddy Status

You can enable your phone to automatically set your status to Away when your phone is idle for a certain length of time.

After you touch the screen or press a key on your phone, your status changes to Available again.

Procedure

1. Go to **Settings** > **Basic** > **Preferences**.

2. Select **Presence** > **Idle Timeout**.
3. Enable **Office Hours** and **Off Hours**, and enter the number of minutes your phone should be idle before your status changes to Away.

Security Classification

For CCX phones registered with the BroadSoft BroadWorks Server, you can view and modify the security classification level for your phone, if enabled by your system administrator.

View the Security Classification for Your Phone

If you are unsure of your security classification, you can view your assigned classification for all lines on your phone.

Procedure

1. Navigate to **Settings** > **Status** > **Lines**.

   If you have only one line, the security classification displays for that line.
2. If you have more than one registered line, select a line.

   The security classification displays for the selected line.

Modify Security Classification Level

You can modify your security classification level to choose a lower level during a call to allow users with a lower classification to join a call or to a higher level to restrict who can join the call.

For example, if you are classified as a Top Secret user, you can lower your classification level to Secret or Restricted during a call. You cannot change the security classification when the phone is idle and not in a call.

Procedure

1. During a call, select **Security**.
2. On the Security Classification screen, choose one of the following options:
   - Top Secret
   - Secret
   - Restricted
   - Classified

   A notification displays on all call participants' phones informing them that the classification level of the call has changed.

Clear Call Logs and Contacts

By default, the phone stores your call logs and saved contacts. As desired, clear your personal history of stored call logs and contacts from the phone.

Procedure

1. On the phone, go to **Settings** > **Basic** > **Clear Uploaded Calls/Directory**.

2. Select **Yes**.

Restrict Call Log and Contact Uploads

By default, the phone stores your call logs and saved contacts. If desired, restrict the phone from uploading your call logs and contacts to the server.

Procedure

1. On the phone, go to **Settings** > **Basic** > **Preferences** > **Restrict Calls/Directory Upload**.
2. Select **Enable**.

Phone Applications

Topics:

- Using the Calendar
- Navigating the Web and Idle Browsers
- Using the Launch Pad

Poly phones can support optional applications configured by your system administrator.

Ask your system administrator if your phone supports any of the applications discussed in this section.

Note: Some of the features described in this section require access to the **Basic** settings menu. If your phone requires a password to access the **Basic** settings menu, contact your system administrator for assistance.

Using the Calendar

When connected to Microsoft Exchange Server, you can view and join meetings scheduled in Microsoft Outlook from your phone.

Enter Your Microsoft Exchange Login Credentials

Your phone uses your login credentials to access Microsoft Exchange Server and other configured applications.

Note: Use web sign-in if your organization requires multifactor authentication when signing in to your Microsoft account.

Procedure

1. Go to **SettingsBasicExchange Sign in**.
2. Enter your user name and password.
3. Select **Submit**.

Related Links

Logging In to Your Poly CCX Phone on page 26

Log in to Exchange Using Web Sign-in

If your administrator enables Exchange calendaring, log in to display and join meetings on your phone.

Note: Use web sign-in if your organization requires multifactor authentication when signing in to your Microsoft account.

Procedure

1. Select **Settings** > **Basic** > **Exchange Sign in**.
2. Select **Web Sign-in** and enter the provided URL into a browser.
3. Enter the code into the Code field and select **Next**.
4. Choose your account or enter your login credentials.

   The Web Sign-in screen disappears returning you to the home page.

Related Links

Logging In to Your Poly CCX Phone on page 26

Open the Calendar

Access the calendar from the meetings screen, the home screen, or the call screen.

Procedure

» Choose from:

- From the calendar screen, select a meeting.
- From the home screen, select **Calendar**.
- Select **Menu** > **Calendar**.
- Select **Place a Call** > **Calendar**.

Display Meeting View on the Calendar

Meeting view displays the details for a chosen meeting.

From Meeting view, you can view the meeting's start and end time, location, organizer, required attendees, and meeting description; view meeting numbers that you can call to join meetings; and join meetings.

Procedure

» From the Home screen, select **Meetings** and select an upcoming meeting.

View Meeting Details

From the calendar you can view meeting details including start time, end time, participants, and notes.

Procedure

» From the calendar screen, select a meeting.

Join a Meeting from the Calendar

The calendar screen lists all upcoming meetings.

Procedure

1. Select **Menu** > **Calendar**.
2. Select the meeting and select **Join**.

If the **Join** button isn't present, select the **More Actions** drop-down menu, choose the meeting number, and complete the sign-in steps.

Navigating the Web and Idle Browsers

The phone supports the following browsers:

- Idle Browser—Displays noninteractive web content.

  The Idle Browser displays noninteractive web content on the Lines screen when no calls are in progress. Your system administrator determines what displays on the Idle Browser for your phone.
- Web Browser—Enables you to search and view web pages

  The Web Browser is an interactive browser. Use the Web Browser to search the Internet and view web pages. From the Web Browser, you can select hyperlinks, enter information into text boxes, and scroll through web pages. There are scrolling indicators on the screen indicating your position on the web page.

Ask your system administrator if the Idle and Web browsers are available on your phone.

View the Idle Browser

When your phone is idle, you can view an Idle Browser when you switch between the Home and Lines screens. To see the Idle Browser, you need to enable the screen saver.

Procedure

» When your phone is not in a call, press the Home key .

Open the Web Browser

When you open the Web Browser, a toolbar with navigation and editing soft keys display for three seconds along the bottom of the screen, as shown next. You can use the navigation and editing soft keys to navigate between web pages and enter information into text boxes in the Web Browser.

Figure 13: Navigation bar in the Web Browser

Procedure

» From the **Home** screen, select **Applications**.

Browser Navigation Soft Keys

The navigation soft keys in the Web Browser enable you to view previous web pages, refresh the current page, return to the browser's Home page, or return to your phone's Home screen.

The following table lists the navigation soft keys that display in the Web Browser.

Navigating the Web Browser

Icon	Action
←	Returns to the previous web page.

Icon	Action
	Refreshes the current web page.
	Returns to the browser's home page.
	Displays the toolbar permanently so it does not hide every three seconds.
	Enables the toolbar to hide every three seconds. To display a hidden toolbar, you have to press the touchscreen until the toolbar displays.
	Exits the Web Browser and returns to the phone's Home screen.

Using the Launch Pad

The Launch Pad enables you to access local or web applications, directories, and information feeds.

Your system administrator can enable Launch Pad on your phone and customize the applications you see. By default, the Launch Pad displays the following applications:

- Picture Frame—Displays your pictures stored on a USB flash drive.

  You have several display options including thumbnail view, slide show view, and single picture view. You can also set one of your pictures as the background image on your phone.
- My Info Portal—Gives you access to a variety of information feeds, such as sports, news, weather, stock, and traffic.

  View information feeds from the idle screen and the Launch Pad.

  When you view feeds, your phone may enter an idle state. If you set up a screen saver, the screen saver displays when your phone is idle.

Access the Launch Pad

You can access the Launch Pad from the Applications menu.

Procedure

» Press the **Applications** key.

The Launch Pad's main window is displayed.

Open Applications

The Picture Frame and My Info Portal applications are default applications available in the Launch Pad. Your system administrator can enable additional applications for your phone that can also be made available in the Launch Pad.

If you haven't enabled the My Info Portal application yet, you need to set up an account before you can access the application.

For information on using custom applications, contact your system administrator.

Procedure

» Do one of the following:

- Select the **Picture Frame** icon.
- Select the **My Info Portal** icon and select the feed you want to view.
- Select an additional application to launch.

Navigate the Launch Pad

When you are using the Launch Pad application, a group of soft keys display to help you navigate the Launch Pad.

Procedure

» Do one of the following:

- Tap **Home** to display the Launch Pad's main window with all the Launch Pad applications.
- Tap **Refresh** to refresh the Launch Pad window and access an updated application.
- Tap **Back** to launch the previous application you viewed.
- Tap **Exit** to return to the Home screen.

Display the Launch Pad's Main Screen

When you exit a Launch Pad application without returning to the main window or the window times out, the next time you access the Launch Pad the last window you viewed is displayed instead of the Launch Pad's main window.

Procedure

» Select the **Home** or **LaunchPad** soft key.

Enable My Info Portal

Before you can access the applications within My Info Portal, you have to sign up for a My Info Portal account.

Note: Information you provide when you set up an account is securely transmitted using the HTTPS security protocol.

If your system administrator has set up My Info Portal to display on your idle screen, you can also see information feeds from the idle screen.

Procedure

1. Press the **Applications** key.

   The Launch Pad's main window is displayed.
2. Select the **My Info Portal** icon.
3. From the **My Info Portal - Welcome** screen, select **Sign Up** and enter your account information.
4. After you enter your account information, select **Sign Up**.

   You can now access the My Info Portal applications and view the information feeds.

Connecting Bluetooth and USB Devices

Topics:

- Enable Bluetooth
- Using Bluetooth Devices on Your Phone
- Using Electronic Hookswitch

Connect your Bluetooth capable phone to a Bluetooth capable headset or smartphone.

Note: CCX 500, CCX 600, and CCX 700 phones support Bluetooth connectivity.

Enable Bluetooth

Use the basic settings menu to enable Bluetooth.

If your administrator has disabled Bluetooth, the option won't be available.

Procedure

1. Choose from:
   - Go to **Settings** > **Basic** > **Bluetooth**.
   - Go to **Menu** > **Bluetooth**.
2. Select **Bluetooth Radio (Off)** and select **On**.

   The Bluetooth icon displays in the phone status bar.

Using Bluetooth Devices on Your Phone

Pair and connect compatible Bluetooth devices such as a mobile phone, tablet, laptop, or headsets with your phone.

If your administrator enables Bluetooth on your phone, you can pair Bluetooth devices in host or device mode. Connect a maximum of two Bluetooth devices at a time.

Host mode – Connect a Bluetooth headset to place and answer calls with a Bluetooth headset.

Device mode – Connect your smartphone to manage calls and user your Poly CCX phone as a Bluetooth speaker.

When you pair your Bluetooth headset to the phone, you can use your headset to manage call audio. When you pair the phone to your PC, tablet, or mobile phone, you can use the phone to answer a call, end a call, or reject a call.

Using Bluetooth Headsets

If your system administrator has enabled Bluetooth capability for your phone, you can use a Bluetooth headset to handle calls.

When a Bluetooth headset is connected and in use, the headset key glows blue. If you have multiple types of headsets connected to your phone, the Bluetooth headset is used automatically for all calls.

This section provides you with information on how to enable Bluetooth, how to pair and connect your Bluetooth headset, how to use your Bluetooth headset with your phones, and how to disconnect and remove your headset.

Connect a Bluetooth Headset to Your Phone

Use a connected Bluetooth headset for all call and conference audio from your phone.

Pair up to five Bluetooth headsets with your phone. However, you can only connect and use one headset at a time.

The phone uses your connected Bluetooth headset as the default audio device for your phone.

Procedure

1. Choose from:
   - Go to **Settings** > **Basic** > **Bluetooth**.
   - Go to **Menu** > **Bluetooth**.
   - Select the Bluetooth icon .
2. Select **Manage BT Devices**.
3. Select **Pair new device**.

   The Available devices list populates.
4. Select a device from the list.
5. Select **Pair**.

Managing Calls with Your Bluetooth Headset

When your Bluetooth headset is turned on, paired, and connected with your phone, you can perform the following tasks:

- Use the headset to handle calls, including muting and adjusting the call volume.
- Initiate and end calls on your headset by pressing the headset key on your phone.
- Switch to handset or speakerphone mode during a headset call by picking up the handset or pressing the Speakerphone key .

When you turn the headset off, the headset is no longer connected but remains paired to your phone. When you turn the headset back on, the headset is reconnected.

Pairing a Smartphone to Your Phone

When your system administrator has enabled Bluetooth on your phone, you can pair your phone to a Bluetooth-enabled smartphone.

After you pair a smartphone to your phone, you can use your phone to handle call controls for the smartphone, including muting the microphone and adjusting call volume.

Connect a Smartphone to Your Phone

Connect your smartphone to your CCX to control your smartphone calls and for audio playback.

Pair up to two smartphones to your CCX. However, you can only connect one smartphone at a time for call control and audio playback.

Procedure

1. Choose from:
   - Go to **Settings** > **Basic** > **Bluetooth**.
   - Go to **Menu** > **Bluetooth**.
   - Select the Bluetooth icon .
2. Select **Manage BT Devices**.
3. Select **Pair new device**.

   The Available devices list populates.
4. Select your smartphone from the list.
5. Select **Pair** on both your smartphone and your CCX.

Managing Calls with Your Smartphone

Note: While you can answer, reject, and end smartphone calls using your CCX phone, you can't place smartphone calls from your CCX phone.

When you pair and connect your smartphone with your CCX phone, you can perform the following tasks:

- Use the CCX to handle calls, including muting the microphone and adjusting the call volume.

  Volume control isn't specific only to the active calls but to any audio played on the CCX phone.
- Answer an incoming call.
- Reject an incoming call.
- End an active call from your phone or a connected smartphone.

Disconnect and Unpair Your Bluetooth Device

Disconnect your Bluetooth device from the phone or unpair the device so it's no longer in the Bluetooth menu.

Procedure

1. Select the Bluetooth icon or go to **Settings** > **Basic** > **Bluetooth**.
2. Select **Manage BT Devices.**
3. Select your connected device from the Connected devices screen and select **Disconnect** or **Forget**.
4. If your device isn't connected:
   a. Select **Previously connected devices**.
   b. Select the setting icon next to your device.
   c. Select **Disconnect** or **Forget**.

Play Audio from a Bluetooth Device

Use your phone as a Bluetooth speaker for music or videos played on your mobile phone or tablet.

Procedure

1. Connect your mobile phone or tablet with the phone.
2. On your mobile phone or tablet, choose the music or video you want to hear.
3. Make sure that the phone is set as your audio device.

   The audio plays through the phone's speakers.

Using Electronic Hookswitch

When you use a headset that supports electronic hookswitch (EHS), you can place, answer, and end calls by using the controls on your headset.

To use EHS, you need a headset that includes a serial control interface in addition to the standard analog headset jack (RJ-9) interface. The serial control interface requires an EHS adapter that you can purchase from your headset manufacturer.

Headsets that support EHS include a base unit that connects to your phone. The headset connects to the base unit wirelessly, which enables you to use your headset even if you're some distance away from your phone. Typically, you can work wirelessly up to 300 feet (91 meters) from your phone and still use the EHS controls. Check with your headset's user guide for the precise range restrictions.

See *Feature Profile 37477: Using Headsets with Polycom Phones* on Polycom Support for a list of compatible headsets.

Setting the Headset Base Unit Options

Before you connect your headset to your phone and use EHS, you need to set the following options for your specific headset model:

- For Jabra headsets, change the headset mode to **DHSG** on the headset base unit. For details, refer to your headset documentation or contact Jabra support.
- For Plantronics headsets, change the coarse receive level to **3** and the transmit level to **B** on the headset base unit. For details, refer to the guide that comes with your headset.
- For Sennheiser headsets, set the first DIP switch labeled **1** (DHSG) to the down position on the back of the headset base unit. For additional details, see your headset's documentation or contact Sennheiser support.

Enable Electronic Hookswitch

After you set the base unit options for your headset and connect your headset to your phone, you can enable EHS.

Procedure

1. Connect your headset and EHS adapter to your phone.

   See the Quick Start Guide for your phone on Polycom Voice Support for information on connecting a headset to your phone.
2. Go to **Settings** > **Basic** > **Preferences**.
3. Select **Headset** > **Hookswitch Mode**.

Change the Headset Mode

To control your phone using your headset, the headset must be in soft phone mode.

Headsets that come with a docking station have two modes: soft phone and desk phone mode. If you cannot operate the phone from your headset, it is possible your headset is in desk phone mode.

Procedure

- » Press and hold the headset hookswitch until you hear a sound or message on the headset.

Controlling Calls with Electronic Hookswitch

After you have followed the procedures for connecting your headset and enabled EHS, you can use the controls on your headset to answer, mute, and end calls. If supported on your headset, you can also place calls on hold. See your headset's user documentation for information on controlling calls from your headset.

When you are in an active call and you receive an incoming call, you cannot use the hookswitch control on your headset to place the active call on hold and answer the incoming call. Pressing the hookswitch control on the headset ends the active call and answers the incoming call. To place the existing call on hold and answer the incoming call, answer the call on your phone.

Disconnect Your Headset

To disconnect or change your headset, properly detach your headset from your phone.

Procedure

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Headset** > **Hookswitch Mode**.
3. Select **Regular Mode**.
4. Remove the EHS adapter from the serial port on the back of the phone.

Connecting to a Wireless Network

Topics:

- Connect to a Wireless Network
- Disconnect from a Wireless Network
- Remove a Wireless Network

You can connect your Wi-Fi capable phone to a wireless network.

Note: CCX 600 and CCX 700 phones support wireless network connectivity.

Connect to a Wireless Network

After you enable Wi-Fi on your phone, connect to a wireless network.

Make sure you have the login credentials for the network you want to connect to.

Procedure

1. Go to **Settings** > **Basic** > **Wi-Fi** > **Wi-Fi**.
2. Select a wireless network from the list.
3. Enter the required information for the chosen wireless network.

   Note: The information required for a wireless network depends on the security settings of the chosen wireless network.
4. Select **Connect**.

Disconnect from a Wireless Network

To change wireless connections or switch to an Ethernet connection, disconnect from the current wireless network.

Procedure

1. Select **Wi-Fi**.
2. Select the connected wireless network SSID from the list.
3. Select **Disconnect**.

Remove a Wireless Network

Remove any saved wireless network that is no longer necessary.

Procedure

1. Select the connected wireless network SSID from the list.
2. Select **Forget**.

Broadsoft Features

Topics:

- BroadSoft Directories
- Managing BroadSoft UC-One Favorites and Contacts
- BroadSoft UC-One Simultaneous Ring
- BroadSoft Executive-Assistant
- Access the Call Actions for BroadWorks Dynamic Busy Lamp Field (BLF)

BroadSoft Directories

If enabled by your system administrator, you can access, search for, and call contacts in any of your company's BroadSoft directories from any phone.

You can access the following BroadSoft directories from your phone:

- **Enterprise Directory**—contains a list of all contacts within the organization and enables you to search for contacts by name or department.
- **Enterprise Common Directory**—contains a list of common contacts within the organization.
- **Group Directory**—contains a list of groups within an organization and enables you to view and search for contacts within those groups.
- **Group Common Directory**—contains a list of contacts that are common across various groups within the organization.
- **Personal Directory**—contains a list of contacts saved in your personal directory on the BroadSoft server.

View a List of BroadSoft Contacts

You can view a list of contacts within your organization from any BroadSoft Directories available on your phone.

Within the directories, you can view a contact's name, job title, and any available phone numbers or extensions.

Procedure

1. Navigate to **Directories**.
2. Select one of the following BroadSoft directories:
   - **Enterprise Directory**
   - **Enterprise Common Directory**
   - **Group Directory**
   - **Group Common Directory**
   - **Personal Directory**

Searching the BroadSoft Directory

You can access and search the BroadSoft directory on the phone, and you can choose to perform a simple or advanced search for contacts.

After the system administrator configures the enterprise directory, you can view a list of contacts by default in the BroadSoft directory. The default contacts list displays even with a blank search of the directory.

Search the BroadSoft Directory

Searching the BroadSoft directory allows you to search for contacts using either their first name, last name, or by typing a few letters of their name. You can view a maximum of 50 contacts at one time.

Procedure

1. Go to **Directories** and select a BroadSoft directory.

   A default list of contacts displays.
2. In the search field, enter your search criteria and select **Submit**.

Perform an Advanced Search of the BroadSoft Directory

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

Procedure

1. Go to **Directories** and select a BroadSoft directory.

   A default list of contacts displays.
2. Select **Advanced Search** and choose how you want to search for a contact: by first name, last name, or a contact number.
3. Optional: Do one of the following:
   - Select **Cs.Sn** to make the search case-sensitive.
   - Select **Cs.In** to make the search case-insensitive.
4. In the search field, enter your search criteria and select **Submit**.
5. Choose your contact.

   A contact details screen displays.

Add BroadSoft Contacts to the Local Directory

After you find your BroadSoft contact, you can add the contact to the Contact Directory.

Procedure

» On the contact details screen, select **Save**.

The first and last name and phone number of the contact save to the contact directory. You can go to the contact directory to see if the contact saved correctly and to add additional contact information.

Managing a Personal BroadSoft Directory

If enabled by your system administrator, you can view and edit contacts in your Personal Directory on the BroadSoft Server from supported CCX phones.

Add a Contact to the Personal BroadSoft Directory

You can add a new contact to the Personal Directory from your phone and store the contact's name and phone number to the directory on the phone and the BroadSoft server.

When you add a new contact to the Personal Directory, you are only required to add a phone number for the contact in the Contact field.

Procedure

1. Go to **Directories** > **Personal Directory**.
2. On the **Add Contact** screen, enter your contact's information in the available fields.
3. Select **Save**.

Update a Contact's Information in the Personal BroadSoft Directory

If your contact's name or phone number changes, you can update your contact's information stored in the Personal Directory.

Procedure

1. Go to **Directories** > **Personal Directory**.
2. Select a contact.
3. On the **Contact Information** screen, select **Edit** .
4. Edit your contact's name or number.
5. Select **Save**.

Delete a BroadSoft Contact from the Personal Directory

You can delete any contact from the Personal Directory.

Procedure

1. Go to **Directories** > **Personal Directory**.
2. On the **Contact Information** screen, select **Delete** .

   A confirmation message displays.
3. Select **Yes** to delete the contact.

Managing BroadSoft UC-One Favorites and Contacts

You can see your BroadSoft UC-One contacts marked as favorites in the UC-One Contacts list and on the Lines screen.

The phones do not support BroadSoft UC-One favorites. Contact your system administrator to find out if this feature is available on your phone.

BroadSoft UC-One Contacts' Presence Information

UC-One contacts are Enterprise Directory contacts that have Instant Messaging and Presence (IM&P) enabled, and you can view their presence information on your phone.

While you can view UC-One contacts presence information on the Lines screen, you cannot change your presence status on the phone. You can change your presence status only in the BroadSoft UC-One client on your computer.

The following table shows the presence icons that display for BroadSoft UC-One contacts on your phone.

BroadSoft UC-One Contact Presence Icons

Icon	Description
	Available
	Available - In a call
	Away
	Busy
	Unavailable
	Offline, Unknown

Viewing BroadSoft UC-One Contacts and Favorites

You can view UC-One contacts and favorites from your phone on the Home and Lines screen and in the Contacts list. You can also view BroadSoft UC-One groups and contacts in each group.

You cannot mark UC-One contacts as favorites on your phone. You must mark contacts as favorites in the BroadSoft UC-One client on your computer. Contacts marked as favorites in the BroadSoft UC-One client display on your phone after one minute.

Note: If the message “Authentication failure” is displayed when you try to view UC-One contacts, make sure you entered the correct BroadSoft UC-One credentials on your phone.

View BroadSoft UC-One Contacts and Favorites

You can view UC-One contacts with presence information and other UC-One contacts marked as favorites on the Lines screen.

Procedure

» From the **Home** screen, press the Home key .

UC-One contacts and favorites display on the Lines screen.

View BroadSoft UC-One Favorites in the Contact List

In addition to viewing UC-One favorites on the Lines screen, you can also view your favorites in the UC-One Contacts list.

Procedure

1. Select **Directories** > **UC-One Contacts**.
2. Select the group name to view the list of contacts for that group.

View BroadSoft UC-One Groups

You can access your BroadSoft UC-One groups on your phone, but you cannot create new groups, delete existing groups, or move contacts from one group to another on your phone. You can alter groups only in the BroadSoft UC-One client on your computer.

Procedure

» Select **Directories** > **UC-One Contacts**.

Your UC-One groups display. If there are no user-defined groups, contacts display under the **All Contacts** group.

View Aggregated Self-Presence for BroadSoft Lines

The home screen displays the aggregated self-presence received from the BroadSoft Messaging Server (UMS).

Procedure

» From the **Home** screen, press ⌂

Filter BroadSoft UC-One Favorites

You can filter your list of contacts either by Favorites or by your contact's status.

Procedure

1. Select **Directories** > **UC-One Contacts**.
2. Select **Filter**.

   A filter selection screen is displayed.
3. Choose your desired filter selection:
   - Select **Favorites** to display only your BroadSoft UC-One Favorites on the Home screen and in the UC-One Contacts list.
   - Select **Online** to display only the BroadSoft UC-One contacts that are currently online on the Home screen and in the UC-One Contacts list.

Search for BroadSoft UC-One Contacts

You can search for UC-One contacts from the UC-One Contacts screen.

Note: For more information on Using BroadSoft applications, refer to web pages BroadSoft UC-One and BroadSoft Instant Messaging & Presence.

Procedure

1. Select **Directories** > **UC-One Contacts**.
2. Select **Search**.
3. Enter your contact's first or last name.

   A list of search results display.

BroadSoft UC-One Simultaneous Ring

When your phone is registered with a BroadWorks server and you are signed into the phone with your BroadSoft UC-One credentials, you can use the Simultaneous Ring feature to add a list of up to 10 extensions and phone numbers that will ring simultaneously when you receive an incoming call on your line.

When the incoming call is answered on one of the phones added to your Simultaneous Ring list, the call is logged in the Missed Calls list on the other phones. Unanswered incoming calls are logged in the Missed Calls lists on all connected phones.

Check with your system administrator to find out if this feature is available on your phone.

Create a Personal Ring Group

Before you can add numbers to your personal ring group, you need to enable the Simultaneous Ring feature on your phone.

Procedure

1. Do one of the following:
2. Select a line.
3. Select **Simultaneous Ring Personal**.
4. Select **Status** > **Enabled**.

Add Numbers to Your Simultaneous Ring List

You can add up to 10 extensions and phone numbers to the Simultaneous Ring list.

When you add an extension or a phone number, you can choose to enable Answer Confirmation Required, which notifies you when a call is answered on one of the added numbers.

Procedure

1. Do one of the following:
2. Select a line.
3. Select **Simultaneous Ring Personal** > **Add**.
4. Enter an extension or phone number.
5. Select **Answer Confirmation Required** to receive confirmation that the call was answered.
6. Select **Save**.

   You cannot pick up or barge in on calls answered on another phone. The contact who answers the call must transfer the call to your phone or park the call on your line for you to speak with the caller.

Delete Numbers from the Simultaneous Ring List

You can delete a number added to your Simultaneous Ring list at any time.

Procedure

1. Do one of the following:
2. Select a line.
3. Select **Simultaneous Ring Personal**.
4. Select the numbers you want to remove and press **Delete**.

BroadSoft Executive-Assistant

The BroadSoft Executive-Assistant feature enables assistants to monitor and manage calls on an assigned executive's line and enables executives to filter calls to assigned assistants and set criteria for filtered calls.

When your system administrator assigns you as an executive or assistant, the Executive or Assistant menu icons and soft keys display on your phone.

Private and Shared Lines for Executives and Assistants

Executives and assistants can both have a private and shared line on their phone. Executives can have private and shared lines that are not managed by an assistant.

The following conditions apply to private or shared lines set as Executive or Assistant:

- For shared lines, the status of any executive calls display on the shared line of the executive and assistant’s phone.
- Assistants can use their private line to place a call or answer calls on behalf of an executive, but neither an assistant nor executive can view the status of calls on a private line.
- For private lines, executives and assistants can pick up held calls on the executive's phone, but neither can choose which held call is picked up.

Executive Options

As an executive, you can view a list of assigned assistants, filter calls to assistants assigned to your line, and set criteria for filtered calls on your line.

Filter Executive Calls

Executives can enable Call Filtering on their phones to send all executive calls directly to an assistant to answer, and the executive is not alerted of the incoming call.

Procedure

1. On the Home screen of the executive’s phone, select **Executive**.
2. Select **Call Filtering** then select **On**.

Set a Filter Criteria for Filtered Calls

Executives can determine which types of calls are filtered to an assistant by choosing whether to filter all calls, internal calls, external calls, or calls as specified in an extended filter, which executives can create and edit in the BroadSoft BroadCloud portal.

Procedure

1. On the Home screen of the executive’s phone, select **Executive**.
2. Select **Filter Criteria**.
3. Choose one of the following:
    - **All Calls**
    - **Internal Calls**
    - **External Calls**
    - **Extended Filter**

Screen Executive Calls

Executives can enable Call Screening, which displays the incoming call notification for all filtered executive calls on the executive's phone.

Call Screening is only available when Call Filtering is enabled.

Procedure

1. On the Home screen of the executive’s phone, select **Executive**.
2. Select **Call Screen** then select **On**.

View a List of Assigned Assistants

Executives can view a list of assigned assistants and see which assistants have opted-in or out of accepting filtered calls for the executive.

Procedure

1. On the Home screen of the executive’s phone, select **Executive**.
2. Select **Assigned Assistants**.

Assistant Options

Assistants can monitor an executive's calls, place calls on behalf of an executive, filter and divert executive calls, and opt-in or out of monitoring calls for an executive.

Answering Executive Calls

When a call is placed to an executive's line and Call Filtering is enabled, the call is displayed on the assistant's phone only. Incoming call notifications for an executive call display with the executive's name in the notification on the assistant's phone. Assistants can answer, reject, or ignore any executive calls.

When Call Screening is enabled, incoming call notifications also display on the executive's phone, and the executive can choose to answer the call.

Place a Call on Behalf of an Executive

As an assistant, you can make calls on behalf of any of your assigned executives.

When a call is made on behalf of an executive, a solid red bar displays on the executive's line key, if the executive's line is a shared line.

Procedure

1. On the Home screen of the assistant's phone, select **Assistant**.
2. On the **Overview Executive** screen, select **Executives** then choose an executive.
3. Select **On behalf** and enter the contact's number or choose a contact from Recent Calls or the directory.
4. Select **Dial** .

   The executive's caller information displays on the third-party's phone.

Push a Call to the Executives Phone

As an assistant, after you answer an executive call, you can push the call to the executive's phone.

You can only push a call to an executive you are assigned to. You cannot push executive calls to other assistants or contacts.

Procedure

» During an executive call, select **Push**.

The call is sent to the executive's phone, which rings to alert the executive of the pushed call. If the executive is unavailable to answer the call, the call is returned to the assistant's phone.

Opt In or Opt Out of being an Assistant for an Executive

As an assistant, you can choose to opt in or opt out of being an assistant and monitoring calls for an executive.

When you opt in to being an assistant, you can monitor and manage all filter calls to the executive. When you opt out, you no longer receive filtered executive calls and cannot manage or monitor executive calls.

Procedure

1. On the Home screen of the assistant's phone, select **Assistant**.
2. Select **Executives** then choose an executive.
3. Select **Status** then do one of the following:
   - Select **On** to opt in to being an assistant for an executive.
   - Select **Off** to opt out of being an assistant for an executive.

Divert Filtered Executive Calls

As an assistant, you can choose to divert filtered calls for all assigned executives to another assistant, contact, or phone.

Procedure

1. On the Home screen of the assistant's phone, select **Assistant**.
2. Select **Call Diversion** then select **On**.
3. Enter the number where you want to divert executive calls.

Pick Up a Held Executive Call on a Shared Line

Executives and assistants can both pick up held calls on shared or private executive lines.

On shared lines, the executive and assistant can view the status of calls on both phones and choose which call to pick up.

Procedure

1. Press and hold the line key with the held call.
2. Select the held call, and select the **Pick Call** soft key.

Pick Up a Held Executive Call on a Private Line

On private lines, the executives and assistants can pick up held calls on each other's phones, but they cannot view the status of a call or choose which held call to pick up.

Procedure

1. On the Home screen of the assistant’s phone, select **Assistant**.
2. Select an executive, then select **Pick Call**.

Barge In on an Executive Call

When there is a call on the executive's line, the executive or the assistant can barge in on the call.

When you barge in on the call, all parties are notified that you have barged in on the call, and you can talk with the other parties on the call.

Procedure

1. During an active call on the executive's line, press and hold the executive line key.
2. Select the **Barge In** soft key.

Silently Barge In on an Executive Call

In addition to barging in on a call, executives can silently barge in on the call and listen to the call without anyone knowing the executive is on the call.

When an executive silently barges in on a call, the other parties are not notified, no one can hear the executive's audio, and the executive cannot talk to the other parties on the call.

Assistants cannot silently barge in on executive calls.

Procedure

1. During an active call on the executive's line, press and hold the executive line key.
2. Select the **S-Barge In** soft key.

Access the Call Actions for BroadWorks Dynamic Busy Lamp Field (BLF)

You can access the call actions settings on the phone and modify the settings from the **Attendant Call Action** menu when dynamic BLF is configured on the phone.

You can one touch the following BLF actions on the phone:

- Dial-Pickup - Indicates the single-press action to use the BLF as a speed dial except the alerting state.
- Blind - Enables the active call to blind transfer to another user with one press of the associated BLF key.
- Park - Enables one-touch call park and retrieve using the BLF keys.

Procedure

1. On the Home Screen, go to **Settings** > **Basic** > **Preferences**.
2. Select the **Attendant Call Action** menu.
3. On the **Attendant Call Action** screen, select one of the following options:
    - Dial-Pickup
    - Blind
    - Park

Ribbon Communications Features

Topics:

- Ribbon Communications Multiple Appearance Directory Number - Single Call Appearance
- Managing the Ribbon Communications Address Books

Ribbon Communications Multiple Appearance Directory Number - Single Call Appearance

Register your phone with the Ribbon Communications server to use Multiple Appearance Directory Number - Single Call Appearance (MADN-SCA). With MADN-SCA, you can share a single line with other contacts in a Multiple Appearance Directory Number (MADN) group.

System administrators assign members to MADN groups. MADN groups support a maximum of 32 members. Any MADN member can place, answer, hold, resume, or barge in on calls on the shared line. Additionally, all group members can view the status of a call on the shared.

Check with your system administrator to find out if this feature is available on your phone.

Placing a MADN Call

Any MADN member can place a call on the shared line. When a member places a call on the shared line, the other members are notified with a steady red LED light on the line key of the members' phones.

Only one call at a time can be active on the shared line. If a call is placed to the shared line with an active call in place, the incoming call is sent to voicemail.

Answering a MADN Call

Any incoming call to the shared line rings on all group members' phones simultaneously. The call is displayed on all members' screens, and a green LED light flashes on the line's line key.

Any MADN member can respond to an incoming call to the shared line. When a MADN member answers an incoming call, the LED indicator on the line key for all phones changes to a steady red light to indicate the call was answered. Members can also view the status of a call on the shared line by pressing and holding the corresponding line key for one second. The call's status and the Barge In soft key display for five seconds.

If bridging is disabled and privacy is enabled for the shared line, you cannot barge in on active calls answered by other MADN members.

Barge In on an Active Call

After a call is answered, any group member can barge in on the active call on a public shared line, which becomes a bridge call—a call between two or more MADN members and another party.

Ask your system administrator about the maximum number of participants allowed on a bridge call.

Procedure

1. Press and hold the corresponding line key for the shared line for one second.
2. Select the **Barge In** soft key.

   A bridge tone plays notifying the other call participants that you are barging in on the call.

Leave a Bridge Call

Any member in a bridge call can leave the call, and the call remains active.

After you leave a bridge call, you can rejoin by pressing the Barge In soft key again.

Procedure

» Select the **End Call** soft key, or place the handset in the cradle.

Your connection to the bridge call is ended, and the other call participants remain on the call.

Resume a Held MADN Call

Any MADN member can resume a held call on the shared line. When an active call is placed on hold on the shared line, all group members are notified of the call's new status by a flashing red LED light on the line key on all members' phones, if enabled by your system administrator.

When a held call is resumed by another MADN member, the other group members are notified of the call's new status with a steady red LED light on the line key on the members' phone.

Procedure

» Do one of the following:

- Select the corresponding line key and lift the handset.
- Press and hold the corresponding line key and select **Resume**.

Enabling Privacy for MADN Calls

Any MADN member can temporarily enable privacy for an active or bridge call on a public shared line using privacy codes or privacy soft keys configured by your system administrator.

Additionally, MADN members can use privacy codes and soft keys to temporarily disable privacy on an active call on a private shared line.

The following are three types of privacy codes that you can use to enable and disable privacy on a shared line:

- **Privacy Access (PRV) code**—Enables privacy for an active call on a public line.
- **Privacy Release Activation (PRLA) code**—Disables privacy for an active call on a private shared line.
- **Privacy Release Cancel (PRLC) code**—Re-enables privacy for an active call on a private shared line.

When a shared line is configured as private or when privacy is enabled on an active call, bridging is disabled and other MADN members cannot barge in on an active call on the shared line.

Enable Privacy

After you enable privacy for an active call on a public shared line, you cannot disable privacy for the call. You can allow other MADN members to join the active call by transferring the call or initiating a conference call.

Procedure

» During an active call, do one of the following:

- Select **Transfer** and dial the PRV code given to you by your administrator

  For example, dial **91*.

- Select the **Priv** soft key, if enabled.

A confirmation tone plays and the call is resumed automatically.

Disable Privacy Temporarily

You can temporarily disable privacy for an active call on a private shared line to allow other MADN members to join the call.

Procedure

1. During an active call, press the **PRLA** soft key or select **Hold** and dial the PRLA code given to you by your administrator.

   For example, dial **921*.

   A confirmation tone plays, and the call is resumed automatically. Privacy is disabled for the call and any member can barge in on the call.
2. After other MADN members have joined the call, press the **PRLA** soft key or select **Hold** and dial the PRLC code given to you by your administrator.

   For example, dial **922*.

   A confirmation tone plays, and the call is resumed automatically.

Enable Privacy on a Bridge Call

You can enable privacy on a bridge call to prevent additional MADN members from barging in to the call.

Procedure

» During a bridge call, select **Transfer** and dial the PRV code or select the **Privacy** soft key, if enabled.

A confirmation tone plays when privacy is enabled and the call is resumed automatically. The bridge call is now private and additional MADN members are not allowed to join the call.

Managing the Ribbon Communications Address Books

When your phone is registers with the Ribbon Communications server, you can access your Global Address Book and Personal Address Book on your phone.

Check with your system administrator to find out if this feature is available on your phone.

Using the Global Address Book

Ribbon Communications Global Address Book (GAB) is a read-only directory similar to the Corporate Directory, which is a company directory enabled and populated with contacts by your system administrator.

Use the GAB to search for and save contacts to the Contact Directory or Personal Address Book (PAB).

Perform a Simple Search of the Global Address Book

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

Procedure

1. Go to **Directories** > **Global Address Book**.
2. In the search field, enter your search criteria and select **Submit**.

Perform an Advanced Search of the Global Address Book

An advanced search lets you search for contacts by first or last name or phone number.

Procedure

1. Go to **Directories** > **Global Address Book**.
2. In the Global Address Book screen, select **AdvFind**.
3. Select a search option and select **Next**. You can choose to search by a contact’s last name, first name, or phone number.
4. Enter your search criteria and press **Next**.

   Your search results display with the contact’s name and phone number.

Save a Global Address Book Contact to the Contact Directory

If you want to modify a GAB contact's information, you need to save the contact to the Contact Directory or the Personal Address Book, if enabled.

When you save a contact to the Contact Directory or PAB, you can modify and save the contact's information in the PAB or Contact Directory.

Procedure

1. After you find your contact, select **View**.
2. In the **Edit Contact** screen, select **Save**.

   The contact is saved to the Contact Directory or your Personal Address Book.

Save Global Address Book Search Results

For the GAB, you can also enable View Persistency, which lets you view your most recent search results in the GAB after you have left the Directory screen.

Procedure

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Global Address Book** > **View Persistency** and select **Enable**.

View Persistency is enabled and you can view your most recent search each time you return to the GAB.

Using the Personal Address Book

Search for contacts, edit contact information, and save contacts to the PAB.

Note: Before importing contacts to your phone, make sure you save all of your contacts to your PAB. Save contacts to your PAB using the Ribbon Communications Personal Agent on your computer. Saving all of your contacts to the PAB ensures that your contacts download to the Contact Directory on your phone.

View Contacts in the Personal Address Book

Contacts saved to your PAB display in the Contact Directory.

Procedure

1. Go to **Directories** > **Contact Directory** .
2. Select a contact and select **Edit**.

   The contact's information, including first and last name, directory number, nickname, and other details display.

Search Your Personal Address Book

You can search for contacts in the PAB by first name or last name.

Procedure

1. In the **Contact Directory** screen, select **Search**.

   Select **More** if you do not see the Search soft key.
2. In the search field, enter your search criteria and select **Submit**.

Add Contacts to the Personal Address Book

When you add a new contact to the PAB, you must enter a unique nickname that is at least one character long for each new contact. If you try to save a contact without a nickname, a message asking you to enter a nickname is displayed.

Procedure

1. In the **Contact Directory**, select **Add** or the **Add** + icon.
2. Enter your contact's information, create a nickname for the contact, and select **Save**.

   The contact is added to the Contact Directory on your phone and to the PAB on the server.

Delete Contacts from the Personal Address Book

When you delete a contact, the contact is deleted from your PAB on your phone and the Ribbon Communications Personal Agent.

Procedure

1. In the **Contact Directory** screen, select a contact and select **Delete**.

A message asking for confirmation to delete the contact is displayed.

2. Select **Yes** to delete the contact.

Editing Contacts in the Personal Address Book

You can edit contacts in the PAB on your phone or in your Ribbon Communications Personal Agent on your computer.

If you modify a contact's information on your phone or computer, the changes are automatically updated in the Ribbon Communications Personal Agent and in the PAB on your phone.

Edit Contacts Locally

You can edit PAB contacts locally on your phone. When you edit contacts on your phone, your contact's information is updated in the Ribbon Communications Personal Agent as well.

Procedure

1. In the **Contact Directory** screen, select a contact and select **Edit**.
2. Edit the information in the contact fields and select **Save**.

Note: If adding, editing, or deleting a contact fails, a message is displayed with the reason the modification failed. Depending on the reason for the failure, the database state can change to “out of sync”. Contact your system administrator if an “out of sync” message is displayed.

Editing Contacts Remotely

When you edit a contact's information in the Ribbon Communications Personal Agent on your computer, the contact's information is updated on the Ribbon Communications Server.

After the contact information is updated on the server, your PAB contact's information is updated immediately on your phone, and a notification with the nickname of the modified contact is displayed on the phone. When a contact is deleted, the phone deletes the contact from the PAB without any notification.

Accessibility Features

Topics:

- Users Who Are Deaf or Hard of Hearing
- Users with Limited Mobility
- Users Who Are Blind, Have Low Vision, or Have Limited Vision

Poly products include a number of features to accommodate hearing, vision, mobility, or cognitively impaired users.

Users Who Are Deaf or Hard of Hearing

Your phone includes accessibility features for users who are deaf or hard of hearing to use the phone.

The following table lists the accessibility features for users who are deaf or hard of hearing.

Accessibility Features for Users Who Are Deaf or Hard of Hearing

Accessibility Feature	Description
Visual message indicators	An indicator light on the phone indicates that new messages are waiting. Icons on the screen also indicate that the phone has new messages.
Adjustable ring tone and volume	You can choose from a variety of ring tones for the phone. You can also change the volume of the ringer to suit your needs and choose different ring tones for contacts.
Adjustable call volume	While in a call, you can raise or lower the volume of the device.
Visual notifications	Status and icon indicators let you know when you have incoming, outgoing, active, or held calls. Indicators also alert you of the device's status and when features are enabled.
Electronic hookswitch	If you use a headset that supports electronic hookswitch (EHS), you can use the controls on your headset to answer and end calls. Additionally, you may be able to mute calls and control volume from your headset.
Hearing aid compatible (HAC) handsets	All phones are hearing aid compatible (HAC) and have telecoils that magnetically couple to most forms of wearable hearing aids per 47 CFR 68.317 & the Telecommunications Telephone Terminal Equipment Magnetic Field and Acoustic Gain Requirements of ANSI/TIA/EIA 504A Feb 1998. The phones are also compliant to Rehabilitation Act Section 508 Recommendations: Subpart B 1194.23.

Accessibility Feature	Description
TTY support	The phones support commercial TTY devices such as Ultratec Superprint. Additionally, the phones provide acoustically coupled TTY support.

Users with Limited Mobility

Your phone includes accessibility features to enable users with limited mobility to use various phone features.

The following table lists the accessibility features for users with limited mobility.

Accessibility Features for Users with Limited Mobility

Accessibility Feature	Description
Auto-answering	You can enable the phone to auto-answer calls.
Touchscreen	The large touchscreen enables you to select, swipe, and press the screen to perform functions and activate features.
Built-in speakerphone	A built-in speakerphone enables you to hear audio on the device without having to use a headset.

Users Who Are Blind, Have Low Vision, or Have Limited Vision

Your phone includes accessibility features for users who are blind, have low vision, or have limited vision to use the phone.

The following table lists the accessibility features for users who are blind, have low vision, or have limited vision.

Accessibility Features for Users Who Are Blind, Have Low Vision, or Have Limited Vision

Accessibility Feature	Description
Adjustable backlight settings	You can change the brightness of the screen by adjusting backlight intensity settings.
Auto-answering	You can enable the phone to auto-answer calls.
Illuminated feature keys	Many feature keys illuminate when activated to alert you when a feature is enabled.

Maintaining Your Phone

Topics:

- Investigate Warnings
- Remove Warnings
- Reboot Your Phone
- Update the Phone's Configuration
- Test the Hardware
- Clean the Touchscreen
- View Software Details
- Updating the Phone Software
- CSTA Lines

When the phone isn't operating properly, investigate or troubleshoot issues along with any other tasks your administrator may ask you to perform.

Investigate Warnings

When a phone is unable to perform certain tasks, a Warning icon displays in the status bar.

View details about the issues from the **Warnings** screen.

Procedure

1. Go to **Settings** > **Status** > **Diagnostics**.
2. Select **Warnings**.

   The **Warnings** screen displays, listing any issues.

Remove Warnings

After you view phone warnings, you can temporarily remove the warning icon from the status bar. However, the warning displays in the Warnings list until the issue is resolved. The warning icon displays each time your phone has a warning that you haven't viewed.

Procedure

» In the **Warnings** screen, select **Clear Icon** to remove the Warning icon from the status bar.

Reboot Your Phone

To assist with troubleshooting, your system administrator may ask you to restart your phone.

Caution: Before you restart the phone, contact your system administrator. If the phone is malfunctioning, you may be able to restore normal operation without restarting it. Additionally, your system administrator may want to troubleshoot the phone before you restart it. You do not need to restart the phone to update its configuration.

Procedure

1. Go to **Settings** > **Basic** > **Reboot Phone**.
2. Select **Yes**.

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

Update the Phone’s Configuration

Your system administrator may ask you to update the configuration for your phone to apply any changes to the phone settings, which you can do without rebooting it.

Procedure

1. Go to **Settings** > **Basic**.
2. Select **Update Configuration**.

   A confirmation message displays.
3. Select **Yes**.

   The configuration updates. The phone may reboot, depending on which settings you changed.

Test the Hardware

If you're experiencing issues with your phone, your system administrator may ask you to test the phone hardware.

Test the display, microphones, and speaker. Contact your system administrator for instructions on how to perform these tests.

Procedure

1. Go to **Settings** > **Status** > **Diagnostics**.
2. Select **Test Hardware** and select an option from the list.

Clean the Touchscreen

The phone screens require minor maintenance, but you may need to clean the screen periodically.

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

Use a clean, dry, microfiber cloth—the kind you would use to clean glass surfaces—to wipe the screen. Don’t use chemicals to clean the screen.

Procedure

1. Go to **Settings** > **Basic**.
2. Select **Screen Clean**.
3. Wipe the screen with the clean, dry, microfiber cloth.

   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, then wipe the screen with the cloth. Always use the dampened cloth to apply the solution; never apply the solution directly to the screen because the solution could seep inside the screen or stain the phone. Do not use chemicals to clean the screen.

4. To enable the touchscreen, follow the onscreen instructions.

View Software Details

View the details for the software version on your phone, the latest software update available for your phone, and the status of the latest update.

Procedure

» Go to **Settings** > **Status** > **PlatformSoftware Update Status**.

Updating the Phone Software

You can update the software on your phone when a new software version is available. When new software is available, a notification is displayed on your phone and you have the option to update your software, postpone the software update, or exit the notification.

Update the Phone Software

When the software update notification is displays your phone, you can choose to update your phone's software at that time.

Procedure

» When prompted to update your software, select **Update**.

The phone reboots and the software updates.

Update the Software Later

If you exit the software update, you can press the **SWUpdate** soft key to update your phone's software at any time after you exit the software update notification.

Procedure

» Press the **SWUpdate** soft key.

Postpone Software Updates

Instead of updating your software immediately, you can choose to postpone the update for a later time.

You can choose to postpone the software update from 15 minutes up to six hours. You can postpone the software update up to three times. After the third time, the notification is displayed without the Postpone option.

If you do not update the phone's software after the postpone time, a notification with a countdown is displayed and the phone automatically reboots and updates the software when the countdown ends.

Procedure

1. When prompted to update your software, select **Postpone**.
2. Select one of the time options.

   The notification is removed from the phone screen and is displayed again during the remaining five minutes of the postpone time selected.

Note: If you postpone a software update and the time period you chose ends while you're on an active call, a software update notification with a countdown is displayed after the call ends. After the countdown ends, the phone reboots and updates the software.

Exit the Software Update Notification

When the software update notification displays, you also have the option to exit the notification without choosing to update or postpone the software.

Procedure

- » When prompted to update your software, select **Exit**.

  When you exit the notification, the **SWUpdate** soft key displays on the Lines screen.

CSTA Lines

When your administrator configures your Polycom phone to use user agent Computer Supported Telecommunications Applications (uaCSTA) with a CSTA server, you can remotely control the phone and access phone services using a computer telephony integration (CTI) application on your computer.

If your administrator registers a CSTA line, you will see an icon and a default label **CSTA**. If the CSTA line is not registered, an icon shows that the line is unregistered.

No call actions are available to you on a CSTA line. When you select a CSTA line, a message displays stating that no action is available.

Troubleshooting

Topics:

- Speakerphone
- USB Port
- Check the Status of the Calendar
- Ribbon Communications Address Book
- Polycom Desktop Connector
- Troubleshoot Audio and Echo Issues
- Bluetooth Headset Issues
- Recording Issues and Solutions
- Reset the Phone to Factory Defaults

If you’re having issues with your Poly phone, you can try the troubleshooting options and solutions in the following topics to resolve certain issues.

Speakerphone

If your speakerphone doesn't work, your system administrator may have disabled it. If this is the case, a message displays after you press the speakerphone key informing you that Handsfree mode is disabled. In this case, use the handset or a headset to handle calls.

USB Port

If you attach a USB device to your phone, and the phone does not detect the attached USB device, your system administrator may have disabled the USB port on your phone.

In this case, you cannot attach a USB device to your phone to use the following features:

- Call recording
- Picture frame
- USB headset

Contact your system administrator for help on enabling the USB port on your phone.

Check the Status of the Calendar

Issues with the phone's connection to the Microsoft server may cause calendar problems. Without a functioning connection, you may not see the **Calendar** icon on the **Home** screen or you may not receive meeting reminders.

Procedure

1. Go to **Settings** > **Calendar**.
2. From the **Calendar** screen, select **Connect**.

Ribbon Communications Address Book

If you are having issues accessing the Global Address Book (GAB), you can view the status of the GAB in the Status menu on your phone and contact your system administrator for further troubleshooting help.

Procedure

» On your phone, navigate to **Settings** > **Status** > **Global Address Book**.

The status information and the server URL for the GAB are displayed.

View the Status of the Personal Address Book

You can view the status of the Personal Address Book on your phone to determine any issues with the PAB. Contact your system administrator for further troubleshooting help.

Procedure

» Navigate to **Settings** > **Status** > **Contact Directory**.

The following information is displayed:

- Status
- Server Control Method
- Server URL
- Registration Index and User ID

Polycom Desktop Connector

If you encounter any issues using the Polycom Desktop Connector (PDC), see the following table for possible solutions to common problems.

Common PDC Problems and Solutions

Issue	Corrective Action
The computer and phone cannot establish a connection.	Verify the Polycom Desktop Connector settings on your phone. You may need to reboot your phone or press the **Reconnect** soft key.

Issue	Corrective Action
I can't enter information in a phone field using my computer keyboard.	Check to see if the phone field has a flashing cursor. You can use PDC only to enter information in a phone field if the field has a flashing cursor.
I can't place a call.	If you're using PDC, you can't place a call using the **New Call** soft key. To place a call, enter the phone number and select **Dial**.
I want to change the phone that is connected to the Polycom Desktop Connector.	Disable the Polycom Desktop Connector, which is already connected to your computer and is in active state on your phone. Setup and enable the phone you want to connect to Polycom Desktop Connector. Once your computer receives an initial communication from the newly configured phone, it asks you to confirm the connection by displaying the message “You were controlling <*MACaddress1*> with your computer. Do you want to change to controlling <*MACaddress2*>?” Click **OK**.

Troubleshoot Audio and Echo Issues

In some cases when you are using your headset during a call, your contacts may experience audio or echo issues, such as feedback of your voice or of their own voice. If your contacts hear an echo during a call when using your headset, enable echo cancellation on your phone.

Procedure

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Headset** > **Echo Cancellation** and select **Enabled**.

Bluetooth Headset Issues

If you encounter any issues using a Bluetooth headset, see the following table for possible solutions to common problems.

Common Bluetooth Headset Issues and Solutions

Issue	Corrective Action
The Bluetooth settings do not display on my phone	Do one of the following: • Check with your system administrator to see if the Bluetooth feature is enabled on your phone. • Make sure the Bluetooth Radio setting is on.

Issue	Corrective Action
My headset doesn't pair automatically.	If your headset is an older model, you may need to enter a password before the headset can pair with your phone. Refer to your headset documentation for more information.

Recording Issues and Solutions

If you encounter any issues recording calls, see the following table for possible solutions to common problems.

Common Recording Issues and Solutions

Issue	Corrective Action
The message “USB device is full. Recording canceled” displays when I pressed Start.	Check that there’s sufficient space on the USB flash drive.
The recording stops during a call.	If the USB flash drive becomes full during recording, recording stops and the message “USB device is full. Recording stopped” displays. Delete previous recordings to make space on the USB drive.
The message “USB device removed unsafely. Recording canceled” displays when I remove my USB flash drive during a call.	Don’t remove the USB flash drive while recording. If you want to remove the drive during a call, press **Stop**, and then remove the drive.
The message “Unsupported USB device attached” displays.	Refer to *Feature Profile 37477: Using Headsets with Polycom Phones* on Polycom Support for a list of USB devices supported on Poly phones.

Reset the Phone to Factory Defaults

Access the phone reset option without having to enter an administrator password.

After the administrator configures this feature on the phone, you can reset the phone to factory default settings.

Procedure

- » Go to **Settings** > **Basic** > **Reset to Factory**.