



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

Quick User Guide

This Quick User Guide is for VVX® 300, 310, 400, 410, 500, 600, and 1500 phones running Polycom® UC software 5.0.0 or later.

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

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

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

www.polycom.com | 1725-47139-002 Rev. A | August 2013

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About Your Phone

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



Web Info: Using the Calendaring Feature

If you want to use the Calendaring feature on any of the supported VVX phones, read the appropriate user guide: [VVX300/310 Phone User Guide](#), [VVX 400/410 Phone User Guide](#), [VVX 500 and 600 Phone User Guide](#), or [VVX 1500 Phone User Guide](#).

Phone Features

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

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

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

For more information on available Lync features on Polycom phones, see [Feature Profile 84538](#).



Tip: The **More** Soft Key

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



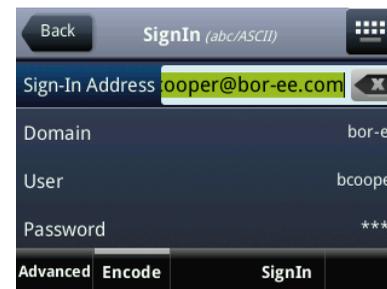
Note: **Lync-hosted Conference Calls Are Not Supported**

You cannot initiate, split, or end a Lync-hosted conference call on your Polycom phone.

Signing Into Microsoft Lync

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

- Press the **SignIn** or **SignOut** soft key.
- Press and select **Settings > Features > Microsoft Lync > SignIn** or **SignOut**. The sign-in screens displays, as shown next.



To sign into Lync:

- Complete the required sign-in fields with your login credentials or PIN authentication. Your system administrator provides you with the correct sign-in information for your login credentials or PIN authentication values.
- After completing the required fields, press the **SignIn** soft key. Your line shows as registered.

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



Troubleshooting: I Can't Sign-In Using My Login Credentials

If you cannot access your Lync contacts, or you lock your account, see your system administrator.



Tip: Using Strong Passwords

Follow your organization's password policy when entering a password for your sign-in credentials. For example, use lowercase and uppercase characters, numbers, and special characters. You can use ASCII, Latin, Katakana, and Cyrillic

characters in all passwords on Polycom phones.

To sign out of Lync:

- » Press the **SignOut** soft key.

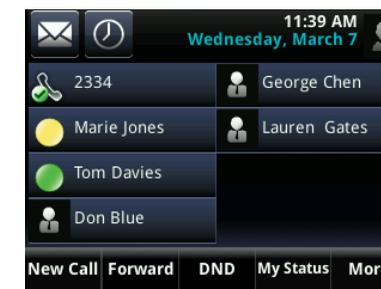
After you sign out, your line shows as unregistered, your presence status is offline, your call lists are deleted, and you are unable to contact any of your Lync contacts using your phone.

Updating Your Microsoft Lync Contacts

You can add, delete, monitor, and call contacts on your Lync contact list. Note that when you delete a Lync contact from your phone, you remove the contact from your Lync account as well.

The following figure shows a home screen displaying Lync contacts. Marie and Tom are Lync contacts, and Don, George, and Lauren are Favorites or Speed dials.

Figure 1: Viewing the Home Screen on VVX 500



Tip: **Lync Contacts on the Home Screen**

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

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

Table 2: Maximum Number of Contacts Permitted

Phones	Number of Contacts
VVX phones	200
All other phones	100

Your phone also displays groups you created using your Lync client. Note that you cannot create new groups, delete existing groups, or move contacts among groups on your phone. You can only make changes to groups in your Lync client on your computer. The following figure displays groups created in your Lync client on your VVX phone.

Figure 2: Viewing Groups on VVX 500



Adding Contacts to Microsoft Lync

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

To add a Lync contact on your phone:

- Press the **Contacts** soft key or press **Settings > Features > Presence > Contacts** and select **Add**.
- Enter the contact's user name and press the **Submit** or **Select** soft key. The following figure shows a Lync contact list.



Updating Your Microsoft Lync Presence Status

Your presence status displays your availability to other Microsoft Lync contacts.

The following table shows the Microsoft Lync presence icons that display on Polycom VVX series phones.

Table 1: Presence Icons on VVX Phones

Icons	Description
	Available
	Busy, In a Call
	Away, Be Right Back, Inactive
	Do Not Disturb
	Offline
	Unknown

To change your presence status:

- » Press the **My Status** soft key, or press **Settings > Features > Presence > My Status** and select your desired status. Your new status displays to everyone on your contact list on your phone and your Lync client.

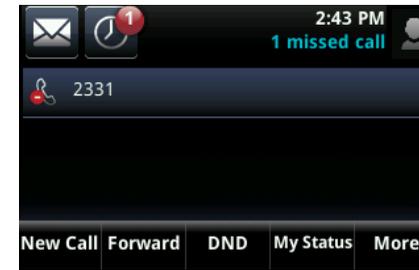
Your presence status also displays when you are off-hook or enable Do Not Disturb. Resetting your status changes it back to **Available**.

When you enable Do Not Disturb on your phone, your Lync presence status changes to *Do Not Disturb*. When you disable Do Not Disturb on your phone, your presence status automatically changes to **Available**.

When you update your Lync presence status to *Do Not Disturb*, incoming calls go to voicemail, and **My Status: Do Not Disturb** displays in the status bar. Updating your status to *Do Not Disturb* does not enable Do Not Disturb on your phone, and the Do Not Disturb icon does not display next to your phone lines.

The following figure shows your phone's home screen when set to Do Not Disturb (DND).

Figure 3: Do Not Disturb on VVX 500



Placing Calls

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

To place a call:

- Pick up your handset or press the handset or speakerphone keys.
- Select a contact to call.

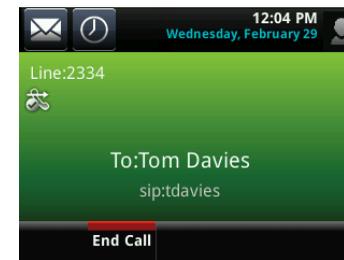


Note: Video Calls on VVX Phones

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

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

Figure 4: Placing a Call on VVX on 500



Tip: Calling Federated Contacts

You can use the SIP URI option to place calls to other companies or remote contacts. For more information, see the appropriate user guide for your phone on the [Polycom Voice Support](#) site.

If network issues delay your call, one of the following messages displays:

- 'Sufficient bandwidth is not available. Please try the call again later.'
- 'Call delayed.'
- 'Call may take longer to connect.'

If you make an emergency call, the message 'This is an emergency call' displays during the call.

Answering Calls

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

Figure 5: Incoming Call on VVX 500



To answer an incoming call:

Lift the handset, press , or press . When you receive another call during an active call, a beeping tone indicates that a call is waiting.

To answer an incoming call while in an active call:

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

If your system administrator has given you a private number, you can give this number to others to contact you directly. The following figure shows an incoming, private call.

Figure 6: Answering Private Calls on VVX 500



Forwarding Calls

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

To forward calls to a contact:

- Select **Forward**.
- Select **Forward to a Contact**.
- Enter the user name or number of your Lync contact. A scrolling message showing that you have forwarded all incoming calls to your contact displays on your phone.

To forward calls to voicemail:

- Select **Forward**.
- Select **Forward to Voicemail**.

The following figure shows the *Forwarding Type Select* screen on VVX phones.

Figure 7: Forwarding Type Select on VVX 600



Parking and Retrieving Calls

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

To park an active call:

- » Press the **Park** soft key, as shown next.

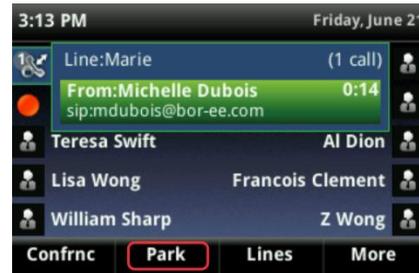
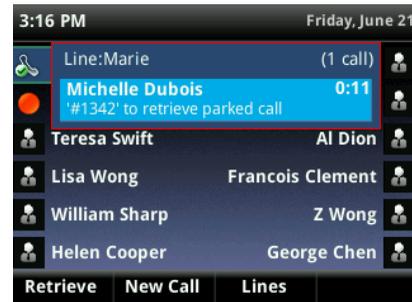


Figure 8: Parked Call Orbit on VVX 400



To retrieve a parked call:

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

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



Note: Parked Call Retrieval Time Limit

The parked call ring back limit is set by your system administrator. If a parked call is not retrieved by the set time limit, the call is returned to your phone.

Assigning Delegates with the Shared Line Appearance Feature

The Lync Shared Line Appearance (SLA), or Boss-Admin, feature enables you to assign delegates, set distinct ringtones, and interact with assigned lines.

To assign Delegates:

- In your Lync client, select **Tools > Options > Call Forwarding > Simultaneous ring**.
- Select **My Delegates** and add contacts as delegates for your line. Simultaneous ringing is automatically enabled for all assigned Delegates.



Settings: Maximum Boss and Delegate Lines

Boss phones can have up to 25 delegates. As a Delegate, you can only view as many Bosses as you have line keys on your phone. If all available line keys have been filled with Boss contacts, additional contacts are not shown on the Delegate's phone.

To assign ringtones for Boss and Delegate lines:

- » Press **Settings > Basic > Ring Type > Delegation Ring Type**, as shown next.



You can choose one of the following ring tones to set for Delegate phone calls:

- Default
- Silent Ring
- Low Trill
- Low Double Trill

Answering and Holding Incoming Calls

The SLA feature enables you to view activity on Delegate and Boss lines. Delegates can answer, hold, or transfer a call on the Boss line. Bosses can pick up held calls on a Delegate's line.

To answer an incoming call on a Boss line:

- » Press **Answer** on your phone. The Boss line is notified when a call is answered on a Delegate's line.

The following figures show an incoming call and notification on a Boss's line.

Figure 9: Incoming Call on Boss Line



Figure 10: Call Answered by Delegate Notification



When a Boss or Delegate places a call on hold, the other is notified of the call's status.

To hold an incoming call:

- » Press **Hold** on the call screen. A red flashing light displays next to the Boss or Delegate's line to indicate a call is on hold, as shown next.



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

- Press and hold the Boss's line.
- Press **Pickup**.

Calling on Behalf of a Boss

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

To call on behalf of a Boss:

- Select the Boss's line key.
- Select a contact or dial the contact's number.
The call displays as 'On Behalf of' Boss's line on the Delegate, Boss, and third-party's phones.

Transferring Calls

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

- **Blind transfer** Transfers the call without speaking with the Boss or Delegate's line.
- **Consultative Transfer** Transfers the call after speaking with the Boss or Delegate's line.

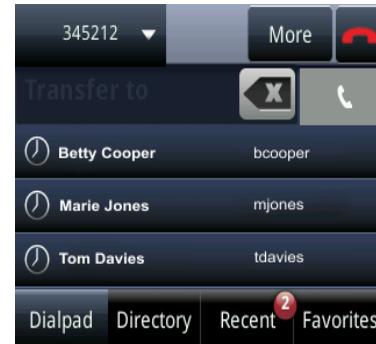
To perform a consultative transfer:

- Press the **Transfer** soft key.
- Dial the number or choose a contact.

To perform a blind transfer:

- Press **Transfer > More > Blind**

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

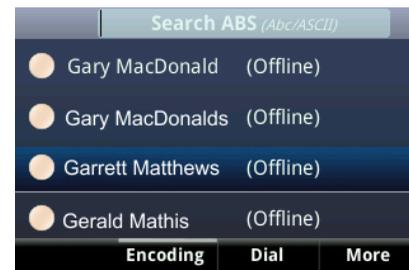


Accessing the Lync Directory

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

To search the Lync Directory:

- Select **Directories > Lync Directory**. A search screen displays.
- Enter your search criteria and press **Submit**. Your search results display, as shown next.



To save a contact from the Lync Directory:

- Search for your contact.
- Select your contact.
- Select **More > Add to Contacts**.

To call a contact from the Lync Directory:

- Search for your contact.
- Select your contact.
- Press the **Dial** soft key.

Connecting with Better Together over Ethernet

Better Together over Ethernet (BToE) enables you to place, hold, and answer calls on your Polycom phone and Lync client on your computer. You need to connect your phone to your computer using your Lync client, an Ethernet cable, and the Polycom BToE Connector to use BToE.

You must download the Polycom BToE Connector application before enabling BToE. You can find the application on the [Latest Polycom UC Software Release](#) support page.



Web Info: Better Together over Ethernet Feature Profile

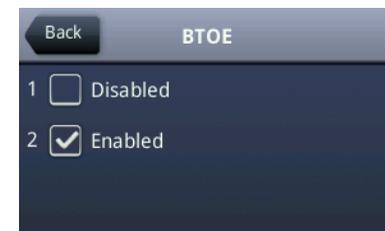
You can find more information on BToE and the Polycom BToE Connector in [Feature Profile 87907: Using Polycom VVX Phones with Better Together over Ethernet](#).

To enable BToE on your computer:

- Install and start the Polycom BToE Connector on your computer.
- Connect an Ethernet cable from your PC to the PC port on your phone.
- Sign in to your Lync client on your computer.

To enable BTOE on your phone:

- » Select **Settings > Features > BTOE > BTOE (Disabled)** and select **Enabled**, as shown next.



To pair your phone with your computer:

- Select **Settings > Features > BTOE Pairing Status > Pair**.
A message 'Successfully Paired' displays.
- Enter your login credentials on your computer.

On your phone, the messages 'Signed into Microsoft Lync account' and 'Better Together Activated' display.



Note: Reconnecting BTOE

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

Using Better Together over Ethernet

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

To place a call from your Lync client:

- In your Lync client, choose a contact.
- Select **Call**. The call displays on your Polycom phone and the Lync client.

To hold a call:

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

To resume a call:

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



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

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