



# Polycom® CX500/CX600/CX3000 IP Phone User Guide

Microsoft® Lync™ 2010 Edition

We recommend you watch the 5-minute Polycom CX600 interactive video tutorial before using this guide. The video will give you a full explanation of the phone's buttons. You will find it on the main IU Northwest UniCom web page:

<http://iun.edu/technology/unicom/>

This guide only includes directions for some of the many features available on the Polycom CX600 phone with Microsoft Lync. Additional resources are available at the above web address for Microsoft Lync.

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## **Patent Information**

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# Polycom® ~~CX500/CX600/CX3000~~ IP Phone User Guide

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IU Northwest is using  
the Polycom CX600 model  
with Microsoft Lync.

Welcome to the new world of Microsoft® Lync™ 2010 Phone Edition communications software. With Lync 2010 Phone Edition, you have voice communication capabilities not available with your traditional phone. For example, with Lync Phone Edition, you can view call logs, join meetings, and make Voice over Internet Protocol (VoIP) calls. In short, you can do everything that you can do today with your regular phone, and more.

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

- Polycom® CX500 IP Common Area/Lobby Phone

For more information about this phone, see

[http://www.polycom.com/support/voice/cx/communicator\\_cx500.html](http://www.polycom.com/support/voice/cx/communicator_cx500.html)

- Polycom® CX600 IP Knowledge/Information Worker Phone

For more information about this phone, see

[http://www.polycom.com/support/voice/cx/communicator\\_cx600.html](http://www.polycom.com/support/voice/cx/communicator_cx600.html)

- Polycom® CX3000 IP Conference Phone

For more information about this phone, see

<http://www.polycom.com/support/voice/cx/cx3000.html>

In this guide, you'll learn to use your phone to:

- [Make a Call](#)
- [View a Contact Card](#)
- [Receive a Call](#)
- [Use Call Controls](#)
- [View Call Logs](#)
- [Check Voice Mail](#)
- [Manage Multiple Calls](#)
- [Escalate a Call to a Conference Call](#)
- [Transfer a Call](#)
- [Join a Meeting from the Calendar](#)
- [Access Phone Settings and Help](#)
- [Reset Your Phone](#)

## Make a Call

When your phone is first setup, you will setup a PIN for your phone that can be used to "unlock" it manually. Most of the time, you will unlock it by simply logging into your computer.



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

- Calling from the Contacts screen on your phone
- Calling by searching for a contact using the keypad
- Calling from Microsoft® Lync™ 2010 on your computer

If your phone is locked, you must unlock it before you can make a call. To unlock it, select **Unlock**.


At IUN, to call someone using the phone's numeric keypad:

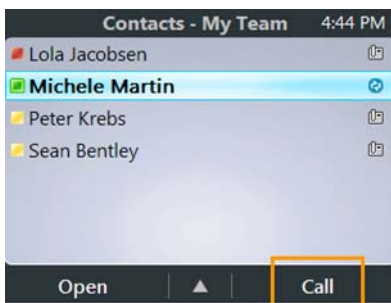
- On campus, dial the 4-digit extension as in the past.
- Off campus, do NOT dial "9" for local off campus numbers and do NOT dial "1" for long distance. Instead, dial the full 10-digit phone number whether it is a local or long distance call. For example: 219-555-1234.
- For long distance calls, authorizations codes are still required. Dial the full 10-digit number, and then wait until you hear a dial tone again, and then enter your long distance authorization code.

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

- 1 From your phone's Home screen, select the **Contacts** icon, and then select the contact group the user is in.



- 2 From the Contacts screen, use the up and down arrow buttons  on the phone to select the contact, and then select **Call**.



You can use the phone number keypad to search for people in the IU Global Address Book who are currently not listed in your own Lync Contacts.

After you type the last name using the keypad, press the \* key twice--once for the comma after the last name and once for the space after the comma. Then start typing the first name.

As soon as you see the name you want, you can stop typing and use the arrow keys to select the name.

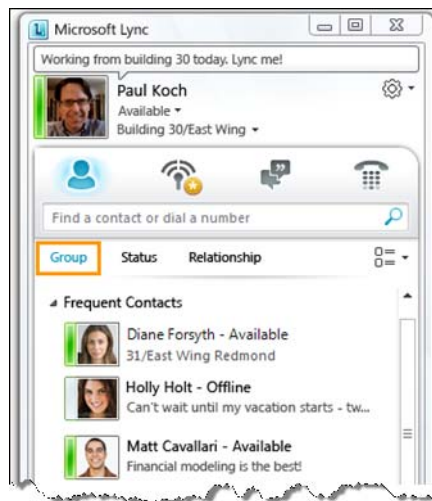
Searching in Lync is usually easier than using the numeric keypad on the phone itself as you can use your computer keyboard to type the name.

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

- 1 Press the numbers on the phone keypad that correspond to the contact name or the phone extension. For example, to find 'Tony Smith,' begin pressing 8669\*76484, where '\*' is the space between the first and last name.
- 2 When you find the contact you want to call, select **Call**.

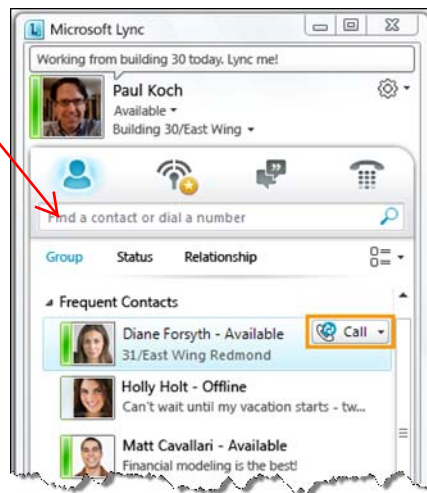
### To call from Lync 2010 on your computer:

- 1 Make sure the optional USB cable that connects the phone to your computer is installed.
- 2 Open Lync 2010 on your computer. In the Microsoft Lync main window, click **Group**, and then click the group the contact is in.



This will be done for you when your phone is activated.

- 3 Click the **Call** button next to the contact you want to call.



## View a Contact Card

These are "contacts"  
you have added to Lync

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

### To view a contact card:

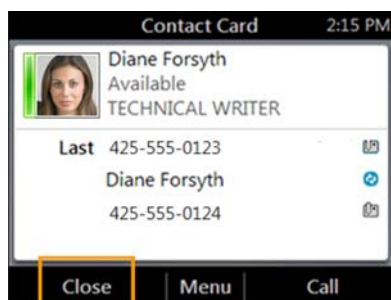
- 1 From your phone's Home screen, select the **Contacts** icon.



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



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



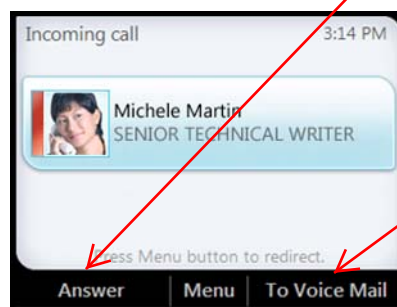
## Receive a Call

You can either answer a call or redirect the call to your voice mail.

### To handle an incoming call:

>> From the **Incoming call** screen, do one of the following:

- To answer the call, either select **Answer** or pick up the handset.
- or
- To send the caller directly to your voice mail, select **To Voice Mail**.



## Use Call Controls




At IUN, ignore the "headset" button on your phone as it can only control a headset plugged into the phone. At IUN, headsets should be plugged into your computer, not the phone.

The volume control regulates: the speaker phone volume while using the speaker phone; the handset volume while using the handset; and the ringer volume while the phone is not in use.



Some of the buttons and features described below may not apply to your phone.

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

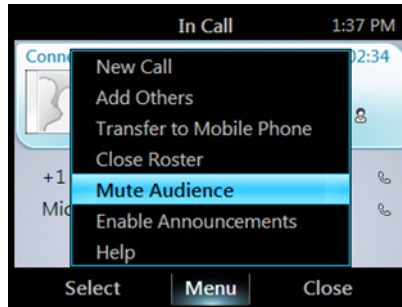
- To enable or disable the speakerphone during calls, press .
- To adjust the volume of the handset, speakerphone, ~~headset speaker~~, and ringer if not in a call, press .
- To mute local audio during calls so that others cannot hear you, press .



- To receive audio through the handset, headset, or speakerphone, you must have the optional USB cable that connects your phone to your computer installed.
- If you adjust the speakerphone volume during a call, the volume setting is retained for all subsequent calls that use the speakerphone.

**To mute everyone except yourself when you're in a conference call:**

>> From the **In Call** screen, select **Menu**, and then select **Mute Audience**.



## View Call Logs

Call logs must be deleted in your Outlook Mail. After Lync has been configured for your computer, new Call Log folders will appear after any other Mail folders you have created.

Delete unwanted call logs periodically just as you clear your Deleted Items folder periodically. We have not found a way to delete then using the phone.

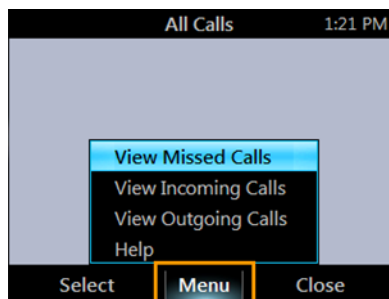
The **Call Logs** screen displays a history of incoming, outgoing, and missed calls.

**To view your call logs:**

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



- 2 From the **All Calls** screen, select **Menu** to sort the calls.



## Check Voice Mail

You can also quickly access Voice Mail by pressing and holding the "1" on the phone's numeric keypad until you see "Voice Mail" appear in the display.

The system will "talk" to you, and you can respond verbally as well. Using this method, after you listen to a voice mail, one of the options you will have is to "delete" the message.

We have found there is a time delay between deleting a message and the red Voice Mail light on the phone turning off.

If your organization has enabled voice mail, you can access your voice mail to check messages or to change your voice mail greeting. If you have unheard messages, the **Voice Mail** icon displays a number indicating how many messages you have, and a red light appears at the **upper right corner** of your phone.

### To check your voice mail:

>> From your phone's Home screen, select the **Voice Mail** icon.



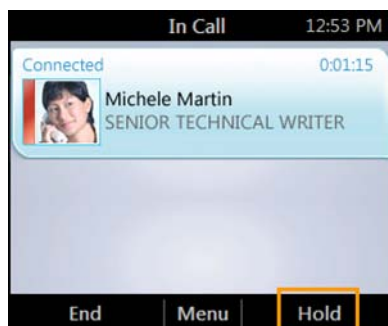
The Voice Mail screen displays the phone number, message date, and time of the call. For contacts listed in your personal contacts or corporate directory, the name and contact card of the sender also displays.

## Manage Multiple Calls

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

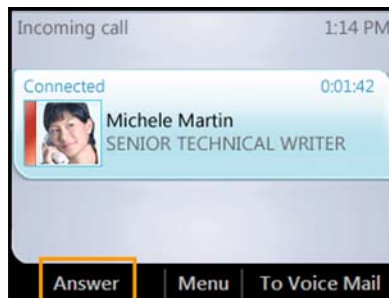
### To place a call on hold:



>> From the **In Call** screen, select **Hold**.

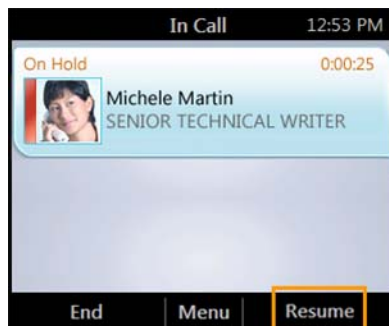


**To answer a second call when you're in an active call:**

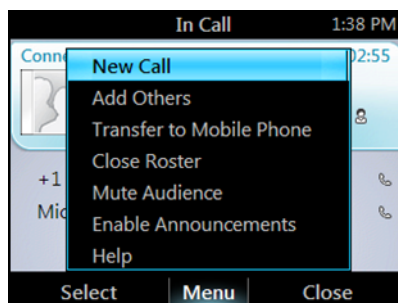
- >> From the **Incoming call** screen, select **Answer**. Your active call is placed on hold and your second call is answered.

**To switch between calls:**

- 1 Press the **Home** button  on the phone, and then select **Active Call**.
- 2 From the **In Call** screen, use the up and down arrow buttons  to select the call that you want to activate, and then select **Resume**.

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

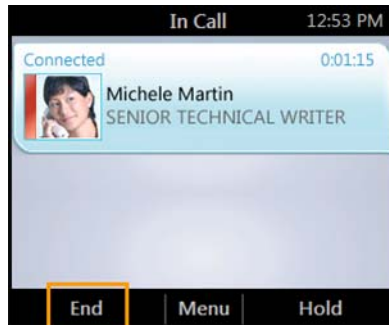
- 1 From the **In Call** screen, select **Menu**, and then select **New Call**. Your active call is placed on hold.



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

**To end a call:**

>> From the **In Call** screen, select **End**.

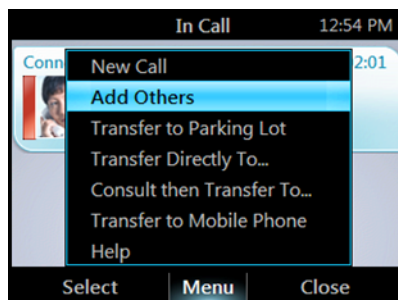


## Escalate a Call to a Conference Call

You can start a conference call during a phone call and add more participants.

**To escalate a call to a conference call:**

- 1 From the **In Call** screen, select **Menu**, and then select **Add Others**.



- 2 To add a participant, enter a phone number or select a contact, and then select **Add**. To add more participants, repeat this procedure.

## Transfer a Call

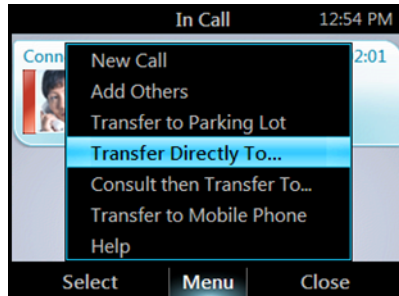
You can transfer calls in these ways:

- To someone else, either directly (without speaking to them), or by talking with them first.
- To a Parking Lot so that the call can be placed on hold and retrieved by someone else.
- To your mobile phone.

When you answer a call, the button to the right of the Menu button becomes a "Hold" button. You can place a call on Hold before you use the Menu button to transfer a call directly to another number or to call and talk (consult) with someone before transferring the call to them.

**To transfer a call directly to someone else:**

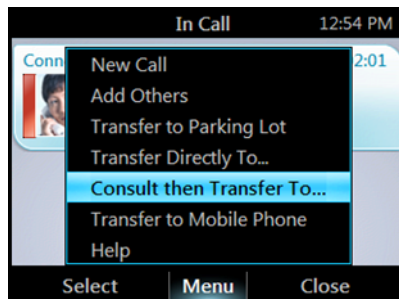
- 1 From the **In Call** screen, select **Menu**, and then select **Transfer Directly To**.



- 2 Enter a number or select a contact, and then select **Call**.

**To consult with someone before transferring a call:**

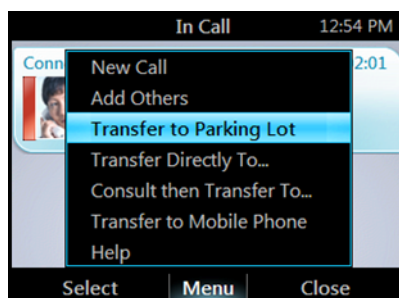
- 1 From the **In Call** screen, select **Menu**, and then select **Consult then Transfer To**.



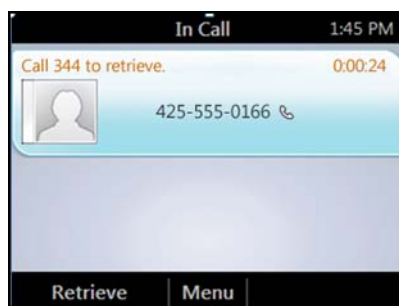
- 2 Enter a number or select a contact. After you speak with the person you're transferring the call to, select **Complete Transfer**.

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

- 1 From the **In Call** screen, select **Menu**, and then select **Transfer to Parking Lot**. The call will be placed on hold.



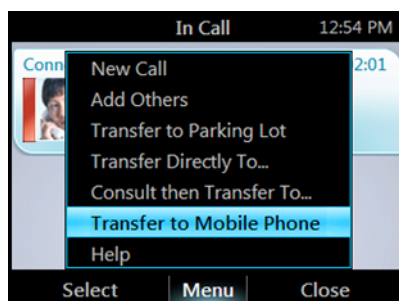
A notification appears, displaying a number to call to retrieve the call.



- 2 Contact the team that you want to answer the call, and give them the number from the notification.

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

- >> From the **In Call** screen, select **Menu**, and then select **Transfer to Mobile Phone**.



## Join a Meeting from the Calendar

Your calendar displays Microsoft® Outlook® appointments for the current day. You can join a meeting by using your phone.



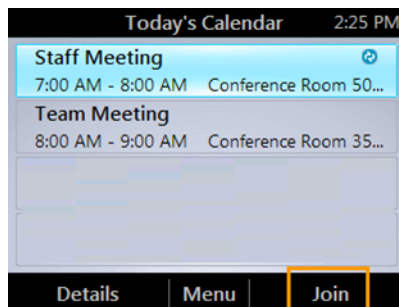
You can join only Lync 2010 online meetings that have been created using the Online Meeting Add-In for Lync 2010.

### To join a meeting:

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



- 2 From the **Today's Calendar** screen, choose the meeting you want to join, and then select **Join**.



## Access Phone Settings and Help

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

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



Some of the above settings may not be available on your phone.

### To access the Settings menu:

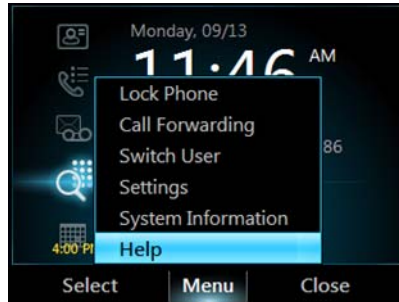
- 1 From your phone's Home screen, select **Menu**, and then select **Settings**.



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

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

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



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

>> From your current screen, select **Menu** and then select **Help**.

## Reset Your Phone

Please contact the  
UITS Northwest Support  
Center to request  
assistance with a reset.  
Ext. 4357

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

**To reset your phone:**

>> While you press and hold the \* and # keys, disconnect, and then reconnect the phone's power supply.

A message displays asking if you want to continue. Select **Yes**.

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

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# Safety Notices

## Service Agreements

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

## Governing Law

This Limited Warranty and Limitation of Liability shall be governed by the laws of the State of California, U.S.A., and by the laws of the United States, excluding their conflicts of laws principles. The United Nations Convention on Contracts for the International Sale of Goods is hereby excluded in its entirety from application to this Limited Warranty and Limitation of Liability.

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**Polycom Limited Warranty and Limitation Liability**

**LIMITED WARRANTY.** Polycom warrants to the end user ("Customer") that this product is expected to be free from defects in workmanship and materials, under normal use and service, for one year from the date of purchase from Polycom or its authorized reseller.

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

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

**Exclusions**

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

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

**Warranty Exclusive**

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

## Safety and Compliance

### Part 15 FCC Rules

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

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

### Class B Digital Device or Peripheral

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

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

### Modifications

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

### Installation Instructions

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

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

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

### Plugs Acts as Disconnect Device

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

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

### Industry Canada (IC)

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

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

### CE and VCCI Mark

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

この装置は、情報処理装置等電波障害自主規制協議会（VCCI）クラス B 情報技術装置です。この装置は、家庭環境で使用することを目的としています。この装置がラジオやテレビジョン受信機に近接して使用されると、受信障害を引き起こすことがあります。取扱説明書に従って正しい取り扱いをして下さい。

### **Safety and Compliance (continued)**

#### **WARNING Electrical Safety**

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

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

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

#### **Russian Compliance**

Complies with Gost:



#### **New Zealand Telepermit**

Polycom CX500 VoIP Telephone PTC 220/10/047

Polycom CX600 VoIP Telephone PTC 220/10/048

Polycom CX3000 VoIP Telephone PTC 220/10/049

#### **PTC General Warning**

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