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InGenius Connector Softphone

Quick Start Guide for InGenius Connector Softphone

Quickstart Guide – InGenius Connector Softphone

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TRADEMARKS

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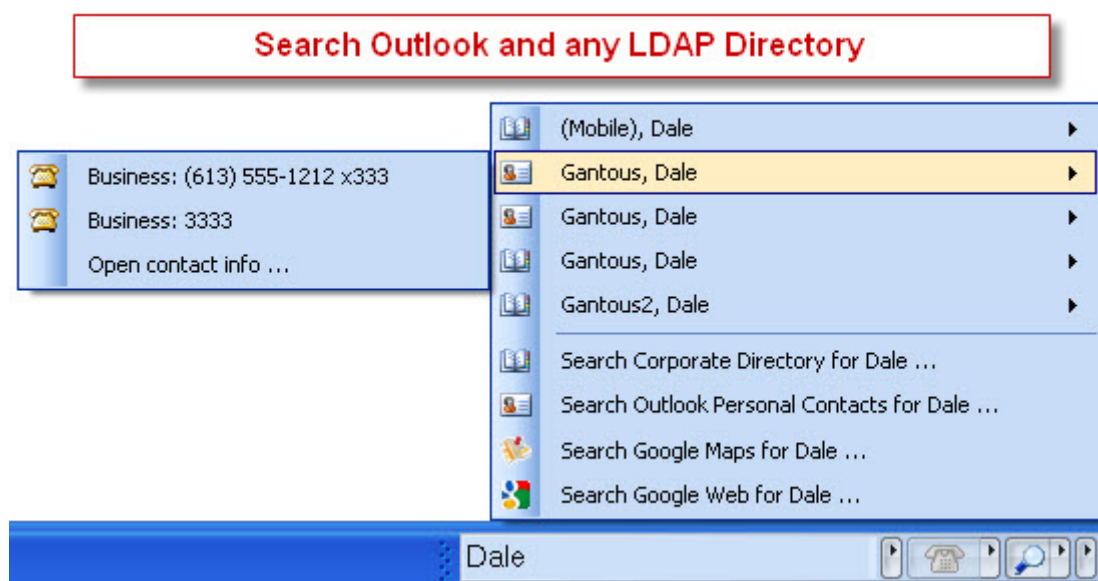
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1 What is InGenius Connector Softphone?

InGenius Connector Softphone is a PC based application that provides you with a slim, low-profile, easy to use softphone, fully integrated with Microsoft® Outlook®, Microsoft Active Directory®, Windows Live Messenger®, and Windows Desktop Search on your PC. And, InGenius Connector provides integrated web searches with GoogleMaps® and GoogleSearch® to locate and dial new contacts with just a single click.

InGenius Connector Softphone is the Softphone version of InGenius Connector. You can license InGenius Connector for your Polycom phones or Asterisk-based system, you can license InGenius Connector Softphone, or you can license both and they will work together.

1.1 What do people love about InGenius Connector Softphone?



All your contacts at your fingertips. All your corporate and personal contacts are at your fingertips, right in your deskband. No need to open Microsoft® Outlook Contacts ... ever.

No big picture of a phone dialpad taking up real estate on your PC screen. Make calls, answer calls, transfer, conference, do everything you want to from the InGenius Connector toolbar.

Tiny, elegant UI. The InGenius Connector sits right in your Windows deskband. No big picture of a phone cluttering up your desktop, no clumsy onscreen dialpad, no intrusive pop-up on incoming call (unless you ask for it).

InGenius Connector Softphone integrates with InGenius Connector for your Deskphone. InGenius Connector Softphone option provides an elegant, integrated softphone – same access to your contacts, same tiny elegant UI, but with softphone included – good for on the road, good for customers who don't want to purchase hard deskphones.

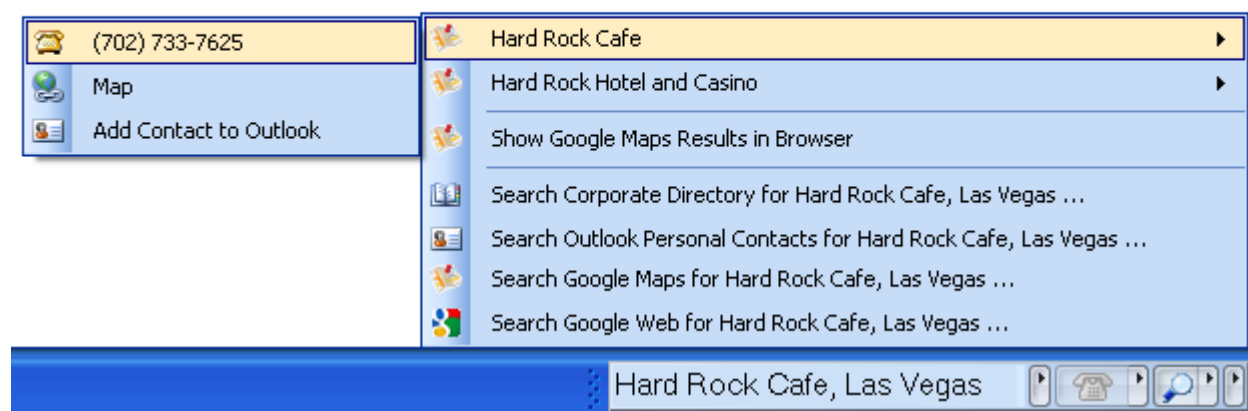
InGenius Connector Softphone travels with you. Whether you're at your desk, at home or on the road, get the same tiny, elegant UI, same access to all your contacts. Works intelligently with multiple phone profiles – multiple deskphones, and InGenius Connector Softphone.

Serverless. No server needed, great for smaller companies with no IT staff.

Infinitely Scalable. Since it is a PC install, you can install as many as you need.


Mass deployment capabilities. Great for bigger companies with great IT staff!

Search-and-Dial from Google, any location



2 Installing InGenius Connector

Use this procedure for the standard install of InGenius Connector (deskphone or Softphone).

 Note: There are mass deployment and configuration options for InGenius Connector. (Please see the InGenius Connector IT Guide)

1. To initiate the install of InGenius Connector, double click the file: **InGeniusConnector.msi**
2. Follow the onscreen instructions in the installation program:
 - a. If not already installed, InGenius Connector will initiate the install of Microsoft .NET Framework 2.0. (Microsoft .NET Framework 2.0 is required to run InGenius Connector)
 - b. On the License Agreement dialog, read the agreement, select “I Agree” and click “Next”.
 - c. Select a folder where InGenius Connector will be installed. By default, it will be installed to “C:\Program Files\InGenius\Connector”
3. The install will then be done. Once complete, you can then choose to “Run InGenius Connector now.”
4. Alternatively, to run InGenius Connector, click Windows Start menu and navigate to Programs->**InGenius -> InGenius Connector**.

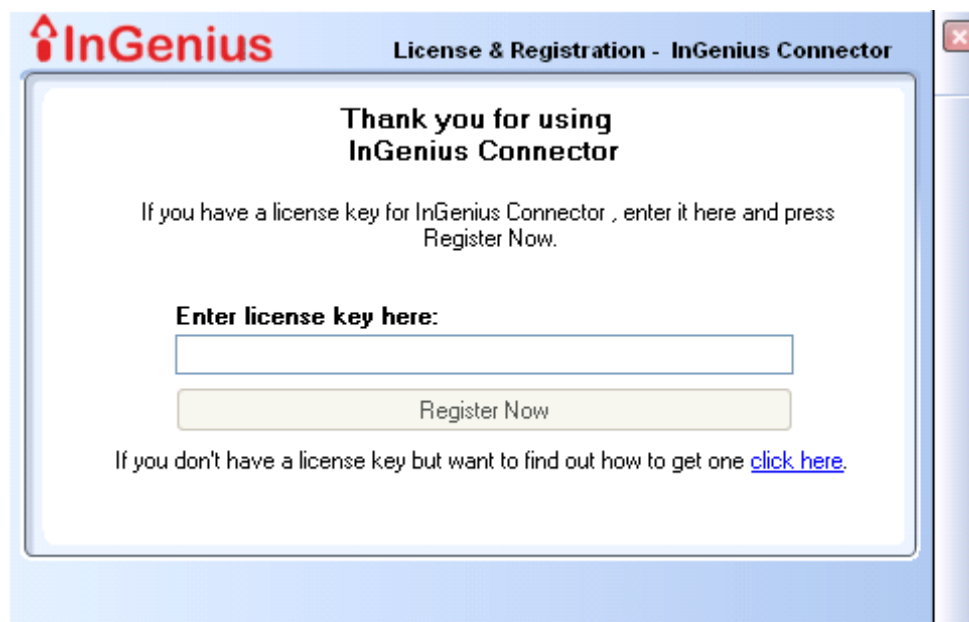
3 Registering InGenius Connector

When you run InGenius Connector for the first time, you will encounter a registration dialog requiring you to enter your license key.

1. Enter your license key.
2. Click “Register Now”

If you do not have a license key, contact us at sales@ingenius.com and we'll provide you with a trial key or a full key.

InGenius Connector can be licensed for use with Polycom deskphones, with phones connected to an Asterisk switch, and with the InGenius Connector Softphone. To use the InGenius Connector Softphone, your license key must include the Softphone capability.



4 Associating InGenius Connector with Your Softphone

InGenius Connector stores information about the phone it connects to, whether it is a Deskphone or the InGenius Connector Softphone, in a **Phone Profile**.

4.1 So what are profiles???

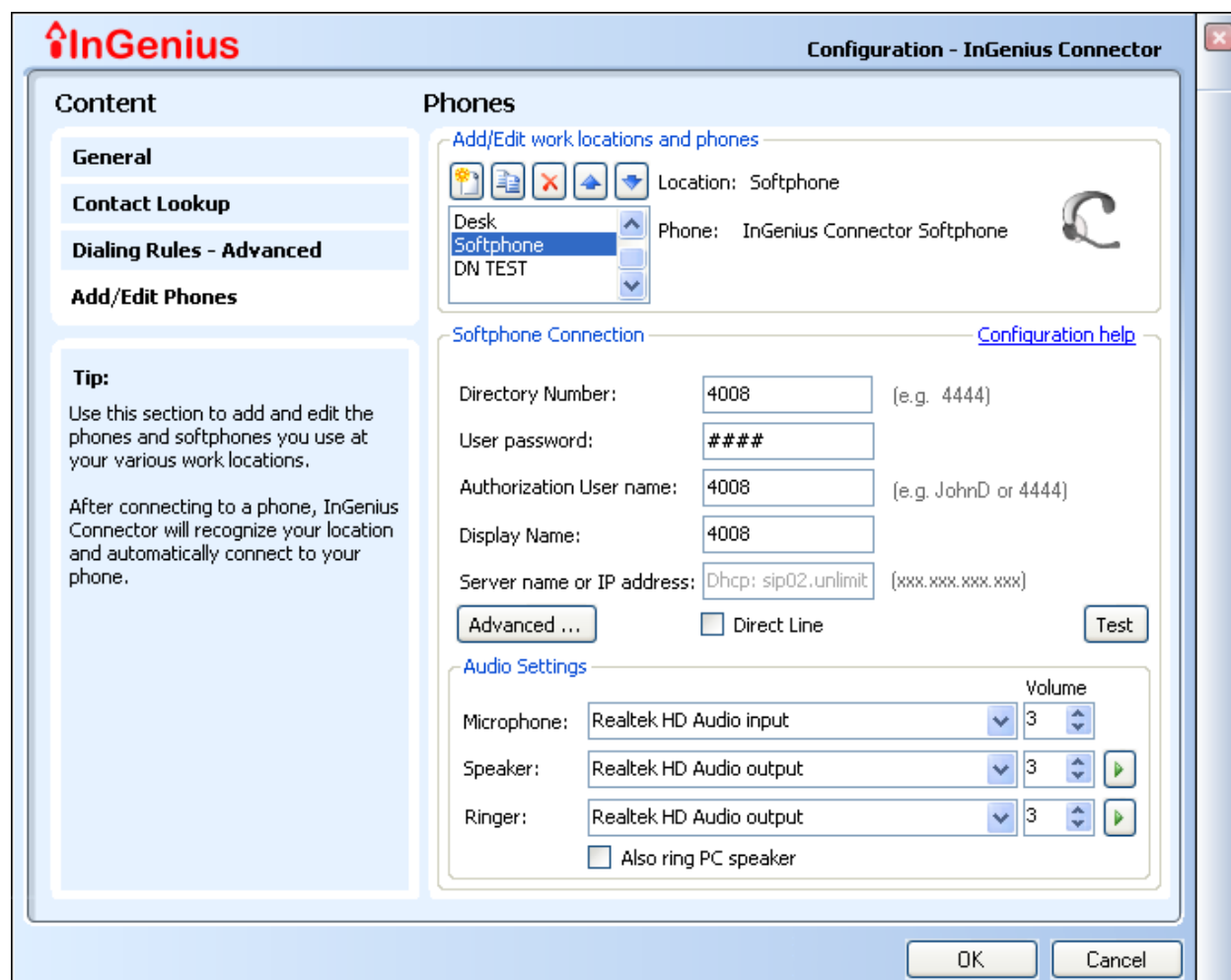
InGenius Connector can connect to your phone in a number of ways, depending on the type of system you are using. You define the connection to the phone using a "profile" which tells InGenius Connector how to connect to your phone.

4.2 Creating a Profile

You create phone profiles in two ways:

1. If you install InGenius Connector as a fresh install, InGenius Connector prompts you to create a new phone profile when it first runs.
2. Or, you can manually add phone profiles as the need arises.

5 Creating an ‘InGenius Softphone’ Phone Profile



The InGenius Connector Softphone allows you to make calls and make use of all the features of InGenius Connector without requiring a standard phone set or hardware.

The InGenius Connector Softphone has to be configured to talk to your switch, like any other phone in your system, or it can be configured to talk to a SIP service provider directly.

The InGenius Connector Softphone uses a speaker and microphone connected to your PC for its audio connection, though we recommend a USB phone device like a Polycom C100 or CX200 for best audio quality.

5.1 Softphone Requirements

Minimum requirements

- PC soundcard
- Speakers/headset
- Microphone

Recommended system

- USB headset and microphone with high audio quality
- OR
- Polycom CX200 or C100 (<http://www.polycom.com/>)
 - CX200 – high quality USB desktop phone
 - C100 – high quality portable USB speakerphone



5.2 Benefits of using the InGenius Connector Softphone

With the InGenius Connector Softphone, you can connect to your phone system from anywhere! This feature makes it great for business travelers. Audio quality can be very good if the connection is good. The InGenius Connector Softphone can also work great with a VPN connection to your office phone switch.

5.3 Notes to be aware of with using the built-in Softphone with InGenius Connector

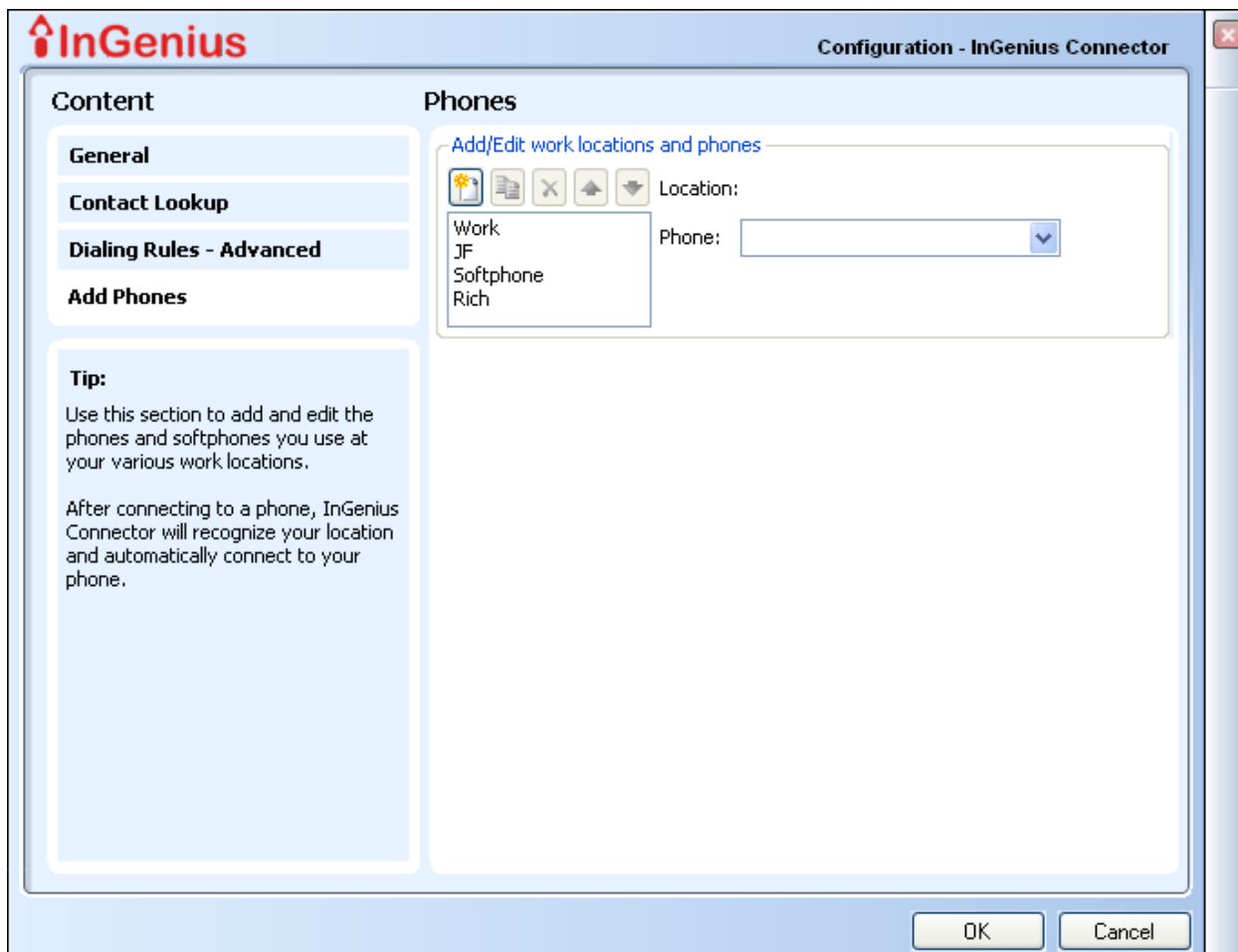
You may need a connection with a SIP service provider if you want to make phone calls while on the road.

Alternately, you can open up an external connection to your office phone system so roving users can connect straight to your office phone switch.

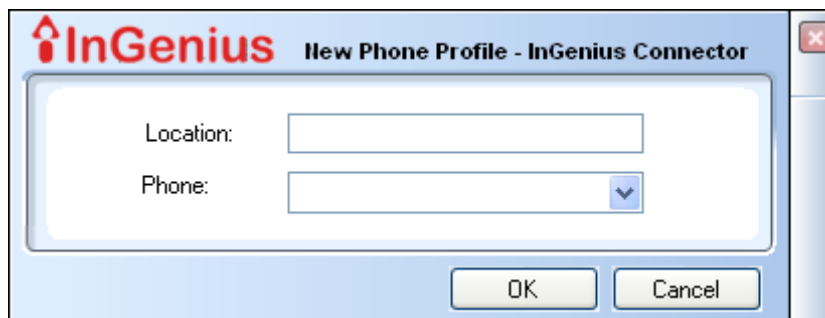
If the Internet connection is slow, audio quality can be affected.

5.4 How to setup InGenius Connector Softphone

To setup an InGenius Connector Softphone profile in InGenius Connector, you can use either the initial Configuration page (pictured at the start of this section) or the InGenius Connector Settings page pictured here:




1. On the “Add/Edit Phones” tab, select the “New Profile” Button:



2. Enter a name for you new phone and select InGenius Softphone from the drop down list and press OK.
3. You will now see a configuration page like the one below:

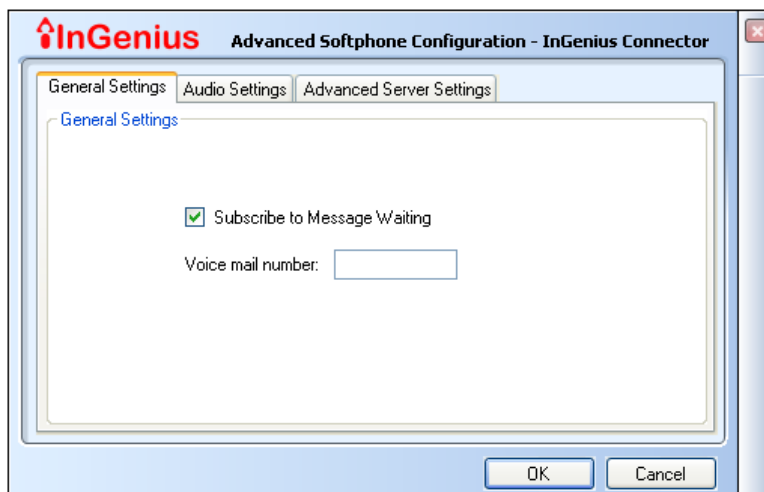
4. All fields are required to setup the phone:
 - **Username or DN:** This is the name that we will use to try to connect to.
 - **User password:** Here you would enter the password that accompanies your username for the account that has already been created on the server.
 - **Authorization User name:** This is the authorization name that is on the server. For most users this will be the same as the Username or DN.
 - **Display Name:** This is the name that will show for your caller ID. For most users this will be the same as the Username or DN.
 - **Server Name or IP:** Here you would enter the name of your SIP proxy server or its IP address.

 **Note:** “Direct Line” is used when the phone defined in the profile has direct access to an outside line – for example, you do not need to dial ‘9’ to make an outside call. Check the “Direct Line” check box if you are using a direct line. Having the direct line box checked will bypass the Windows Telephony Dialing

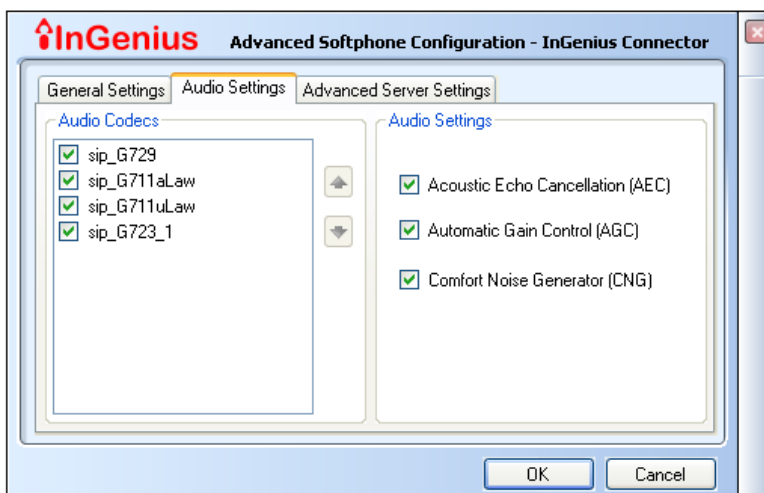
Rule for accessing an outside line for this profile.

5. You can also configure advanced settings:


- **General Settings:** Here you will be able to subscribe to your message waiting and voice mail. If your server does not support voice mail you can turn it off.



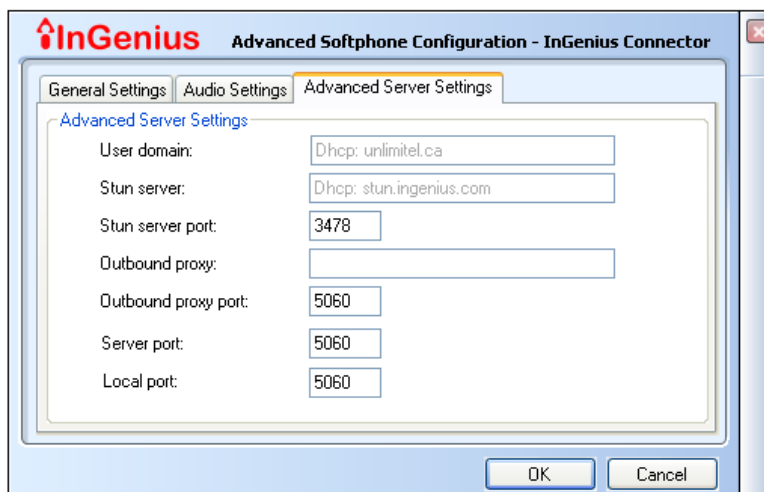
- **Audio Settings:** Audio codecs and settings allow you to enable and disable specific audio codecs and settings that can be used in a phone call.




- **Advanced Server Settings:** Here you can extend SIP settings including STUN server and outbound proxy.
 - **Server Port:** Here you would enter the port to connect to your SIP proxy server and must be opened through your firewall. This is usually 5060.

 **Note:** Some firewalls will only allow one local IP to use a port. Therefore, if InGenius Connector is not the first IP to use port 5060, you may have to select an alternate port to connect to your SIP proxy server.

- **Local Port:** Here you would enter the port to connect to your SIP proxy server and must be opened through your firewall. This is usually 5060.



 **Note:** that many installations require the use of a STUN server for successful calls. You can use stun.ingenius.com as your stun server.

6. Next you can configure your audio settings

- **Microphone:** The microphone device allows you to select the audio input device to use while on a call.
- **Speaker:** The speaker device allows you to select which audio output device to use while on a call.
- **Ringer:** The ringer device allows you to select which audio device the ringer should use during an incoming call. The ringer can also play sound through the computer's internal speaker if the option is enabled.

7. Press the “Test” button to verify your settings.

8. Press “OK” to save your settings as a new profile.

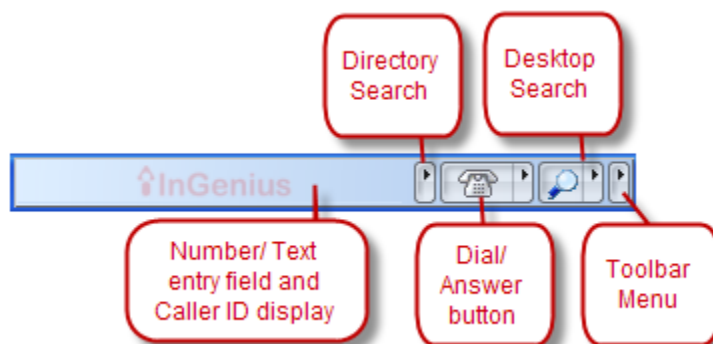
5.5 Testing out your InGenius Connector Softphone Profile

Once the InGenius Connector Softphone has been configured you can press the “Test” button to verify the connection parameters. Once the “Test” button has been pressed, InGenius Connector Softphone will attempt to connect to the SIP server you entered with the credentials you provided.

6 InGenius Connector Toolbar

All InGenius Connector features, whether connecting to a deskphone or InGenius Connector Softphone, are available from a convenient toolbar. To display it, right-click on the Windows task bar, select the Toolbars sub-menu then select InGenius Connector. The toolbar will be displayed when you run InGenius Connector.

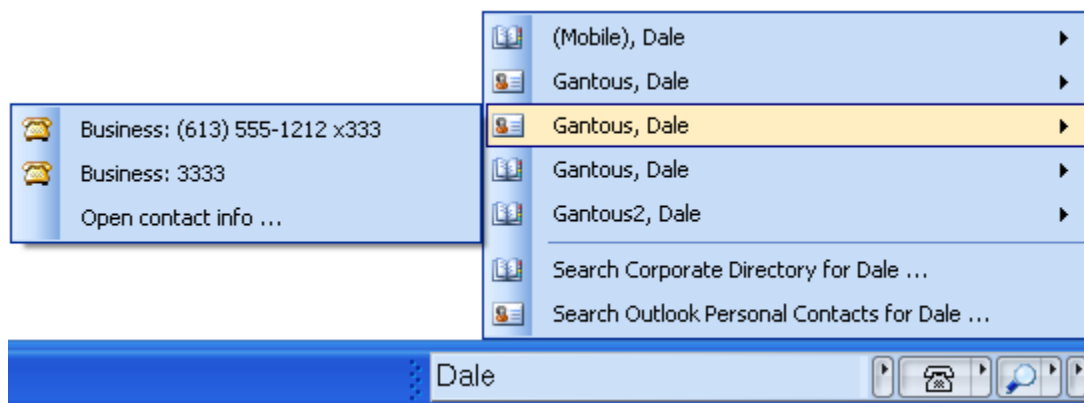
You will then see the toolbar GUI shown here:



You can hide the toolbar by following the same steps to uncheck the InGenius Connector option.

6.1 Click to Dial: Dialing by Name

When you type a name in the text field of the InGenius Connector Toolbar, a list of matches and alternate phone numbers from both your Corporate Directory and Outlook contacts will be displayed. To dial, just click on the phone number match that you want. By combing Windows telephony settings with InGenius Connector dialing rules in the application settings, InGenius Connector can dial the 9 and 613 for you automatically!

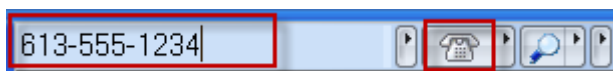


6.2 Dialing by Number

InGenius Connector offers a number of ways to dial (and it can dial the 9-613 for you automatically!)

6.2.1 Dialing by Typing in a Number:

Type a number in the text field and press the dial button.



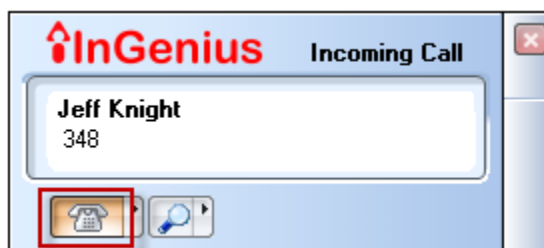
6.2.2 Dialing by Drag'n'Drop

Highlight a number in a Word document, email, etc and drag the number into the text field and press the dial button; or, you can use copy and paste.

6.3 Incoming Calls

Incoming calls get displayed in the text field of the InGenius Connector Toolbar, and the phone button flashes. You can also configure InGenius Connector to display or a pop-up window when you receive an incoming call.

Answer the call by clicking the Answer button on the Pop-up.



From the Incoming Calls Pop-Up, you can also open an Outlook contact or do a Microsoft Desktop Search based on the Caller ID

After the call, you can return a call to this person by just clicking the dial button. There is a Missed Calls and Redial list as well.

