

InGeniusSoftware.com



InGenius Connector

Quick Start Guide for Polycom SoundPoint & SoundStation Phones

Quickstart Guide – InGenius Connector for Polycom
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TRADEMARKS

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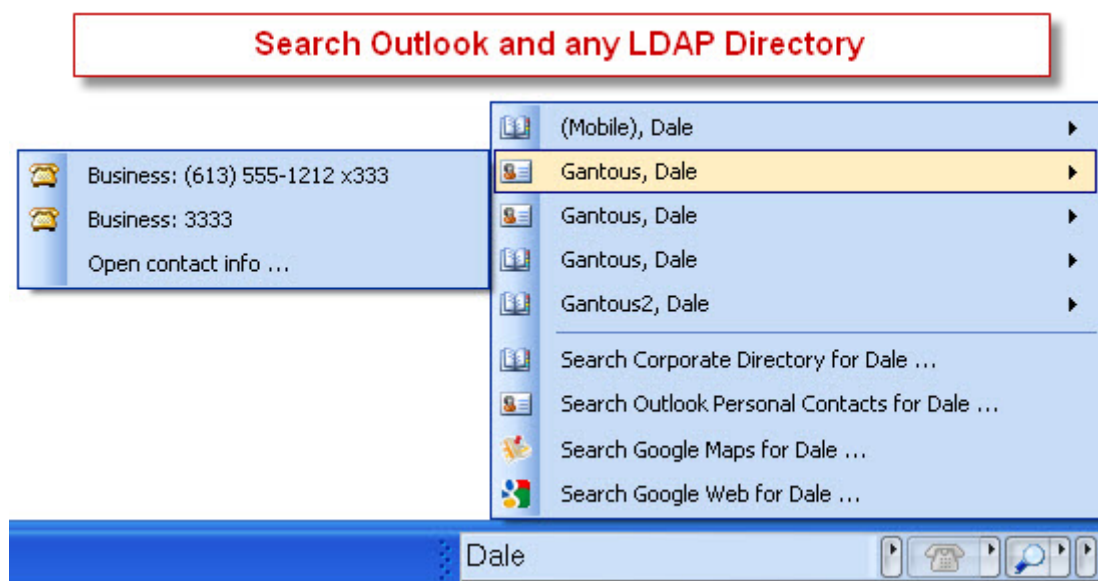
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1 What is InGenius Connector?

InGenius Connector is a PC application that provides search-and-dial capabilities and incoming caller ID screen pop, with full Microsoft® Outlook® and Active Directory® or LDAP Directory integration. And, InGenius Connector provides integrated web searches with GoogleMaps® and GoogleSearch® to locate and dial new contacts with just a single click. Integrated optional softphone, same great UI!

1.1 What do people love about InGenius Connector?



Increase Personal Productivity: InGenius Connector provides an innovative telephony toolbar GUI that allows users to manage their phone communications with speed and ease – directly from the Microsoft Windows® taskbar on their PC desktop. With features such as search-and-dial and caller ID pop-up, InGenius Connector simplifies routine communications and helps users maximize their operational efficiency.

Seamlessly Integrates Outlook® and Google®: With InGenius Connector, you can not only search your personal contacts and corporate contacts, but you can also instantly query GoogleMaps® and GoogleSearch® for the number you're looking for. The searches are localized to your geographic area, or the city that you specify. Want to order pizza? Just type pizza into InGenius Connector and voila! You can dial any of your local pizza shops with a single click. Want to get married in Las Vegas? Just enter "Cupid, Las Vegas" into InGenius Connector, click to dial and book your date! And, with a single click you can add your selected entry as a new Outlook Contact, with no typing at all!

InGenius Connector Softphone Edition: The optional InGenius Connector Softphone integrates seamlessly into InGenius Connector, providing all the same business features to your mobile workers. InGenius Connector automatically detects network configuration, and uses your local Polycom IP phone when you're in the office, or your InGenius Connector Softphone when you're on the road. Same great integration features, same elegant toolbar user interface. No big telephone dial-pad using up precious desktop real estate or interrupting your workflow.

Enhanced Integration Features: In addition to search-and-dial and caller ID pop-up, InGenius Connector provides out-of-the-box enhanced functionality including:

- auto open a contact record based on incoming caller line ID
- create a new Outlook® contact, task, or email for an incoming caller
- Windows Desktop Search to locate documents, e-mails, and corresponding records based on the incoming caller ID – either automatically or at the click of a button.
- Missed calls, last number redial

Corporate Solution: Increase Group Productivity with InGenius Connector CRM Integrations: InGenius CRM integrations will help you cultivate customer relationships with ease and increase your customer facing employees' efficiency. InGenius Connector's plug-in architecture makes it easy to connect directly to your Corporate CRM system.

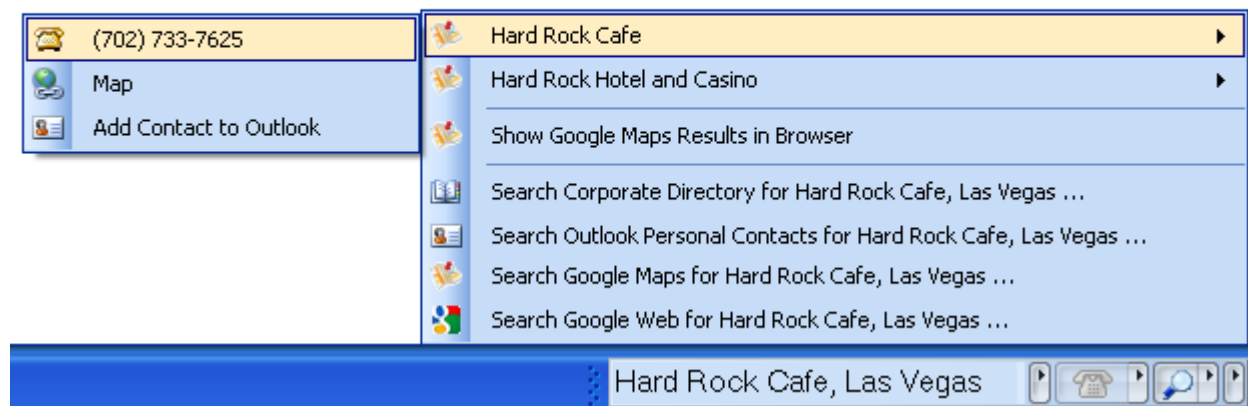
Available integrations include:

- TSP plug-in for TAPI-enabled CRM systems
- Microsoft® CRM plug-in
- Salesforce.com plug-in
- CRM integrations available on request.

Serverless, and Easy to Deploy in small or large organizations: Designed for easy configuration and installation, InGenius Connector is serverless. And it provides IT personnel with a number of implementation options – from simple end-user downloads to larger-scale pull or pushed-based mass deployment.


Low Cost of Ownership: Lack of an applications server simplifies implementation and maintenance, while reducing the overall solution cost.

Search-and-Dial from Google, any location



2 Installing InGenius Connector

Use this procedure for the standard install of InGenius Connector.

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

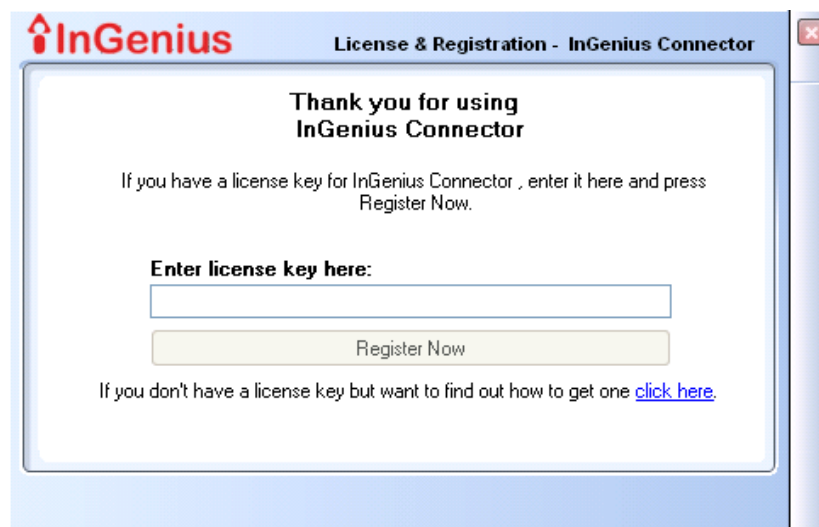
1. To initiate the install of InGenius Connector, double click the file **InGeniusConnector.msi**
2. Follow the onscreen instructions in the installation program:
 - a. If not already installed, InGenius Connector will initiate the install of Microsoft .NET Framework 2.0. (Microsoft .NET Framework 2.0 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.



4 Associating InGenius Connector with Your Phone

InGenius Connector stores information about the phone it connects to 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.

5 Creating a ‘Polycom IP Phone’ Phone Profile

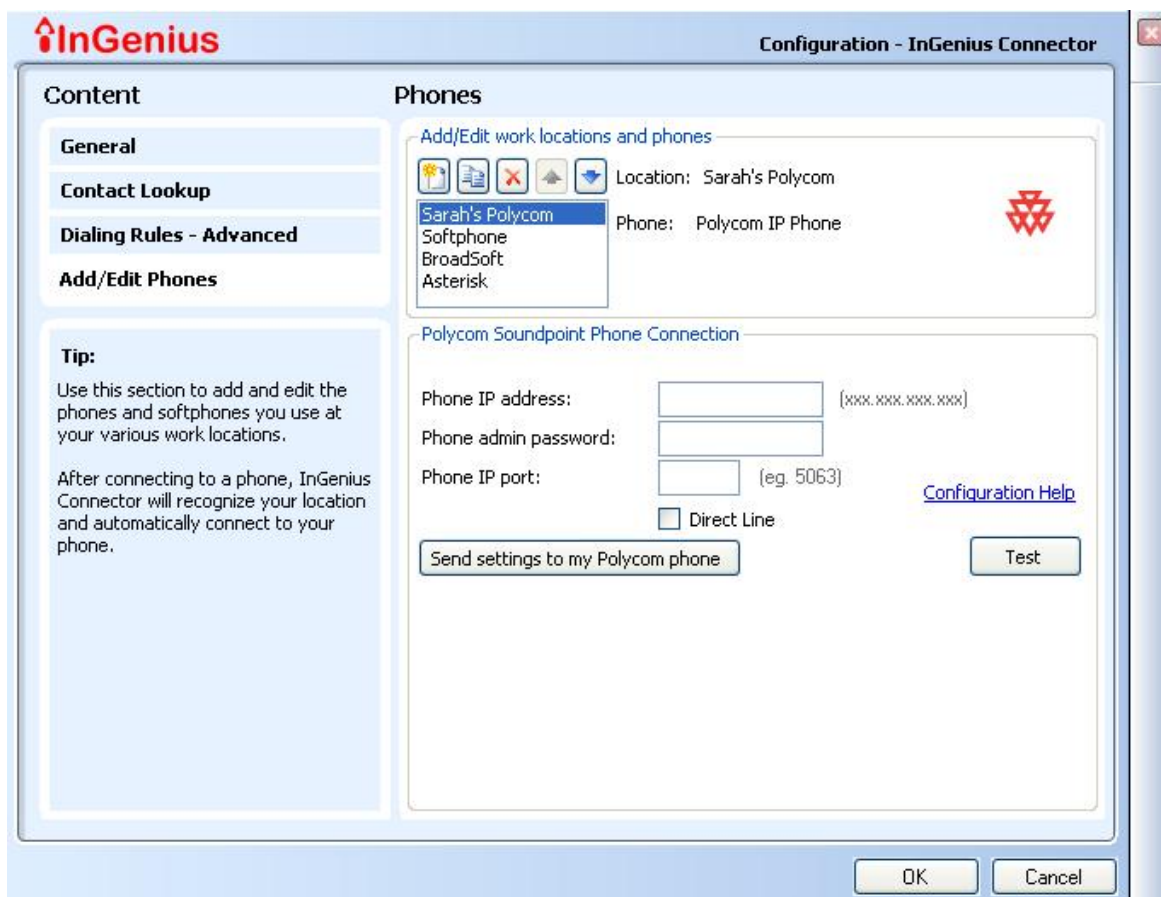
InGenius Connector can talk straight to the Polycom phone sitting on your desk when using a Polycom phone profile. It uses a feature of Polycom phones known as XML control, which is configured using the Applications page of your Polycom HTML configuration. InGenius Connector can write the appropriate settings directly into your Polycom phone.



5.1 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. For example, you may want to create a profile called “Work” for your Polycom deskphone, and another profile called “On the Road” for when you are on the road using the optional InGenius Softphone.



5.2 Supported Polycom Models

- SoundPoint IP 330/320, 430, 450, 501, 550, 560, 650, and 670 desktop phones
- SoundStation IP 4000, 6000, and 7000 conference phones.

5.3 Benefits of using a Polycom phone with InGenius Connector

This connection profile is one of the most powerful and full featured profiles. You can dial, answer calls, place them on hold, retrieve them, and see caller ID.

It does not matter what type of phone switch your Polycom phone is connected to. As long as you can make and receive calls manually, InGenius Connector will be able to do the same, just way more efficiently.

5.4 Notes to be aware of with using a Polycom phone with InGenius Connector

Your phone has to be running a recent version of Polycom's firmware – which means you may have to upgrade your phone's firmware.

When using a Polycom phone, InGenius Connector acts as a web server that the phone can communicate with. Because of this, the PC's firewall has to have an HTTP port open.

5.5 Minimum Polycom Requirements for InGenius Connector

- Minimum firmware load: 3.1
- Suggested Firmware load: 3.1.2.0392 or later

Please visit http://downloads.polycom.com/voice/voip/sip_sw_releases_matrix.html to find the latest supported firmware release for your phone

5.6 How to find the IP address of your Polycom phone

To find out the IP address of your Polycom phone, please follow the following steps:

1. On the Polycom Phone press the “Menu” Button
2. Scroll to the “Status...” menu item and press Select
3. Scroll to the “Platform...” menu item and press Select
4. Scroll to the “Phone...” menu item and press select
5. Scroll down see your phone IP on the screen similar to IP:xxx.xxx.xxx.xxx



5.7 How to find the Firmware version of your Polycom phone

To find out the current firmware version running on your Polycom phone, please follow the following steps:

1. On the Polycom Phone press the “Menu” Button
2. Scroll to the “Status...” menu item and press Select
3. Scroll to the “Platform...” menu item and press Select
4. Scroll to the “Application...” menu item and press select
5. Scroll to the “Main...” menu item and press select
6. You should see your firmware version on the screen similar to Version: 3.1.2.0392

5.8 How to find the BootROM version of your Polycom phone

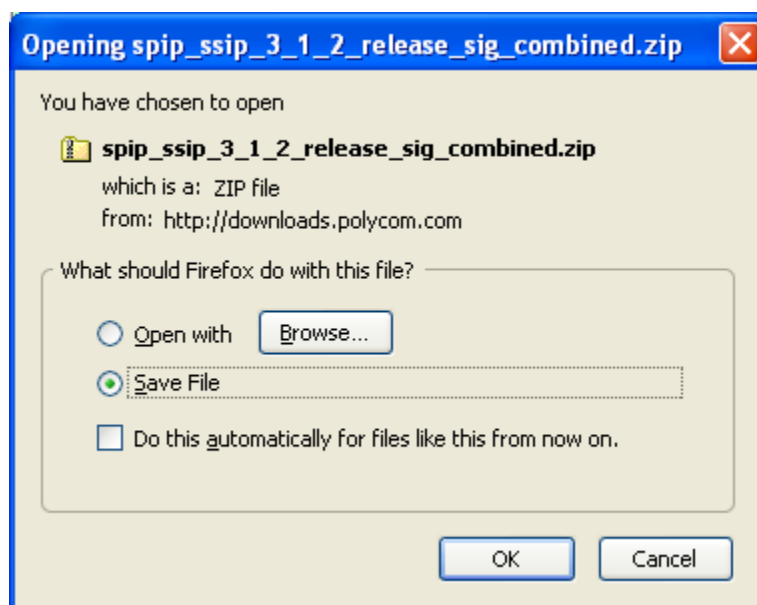
To find out the current firmware version running on your Polycom phone, please follow the following steps:

1. On the Polycom Phone press the “Menu” Button
2. Scroll to the “Status...” menu item and press Select
3. Scroll to the “Platform...” menu item and press Select
4. Scroll to the “Phone...” menu item and press select
5. Scroll down to the bottom of the page to see BootROM:4.1.2.0037

5.9 How to update the Firmware of your Polycom phone

If your Polycom phone requires a new firmware load you will need to follow the following steps to upgrade the phone.

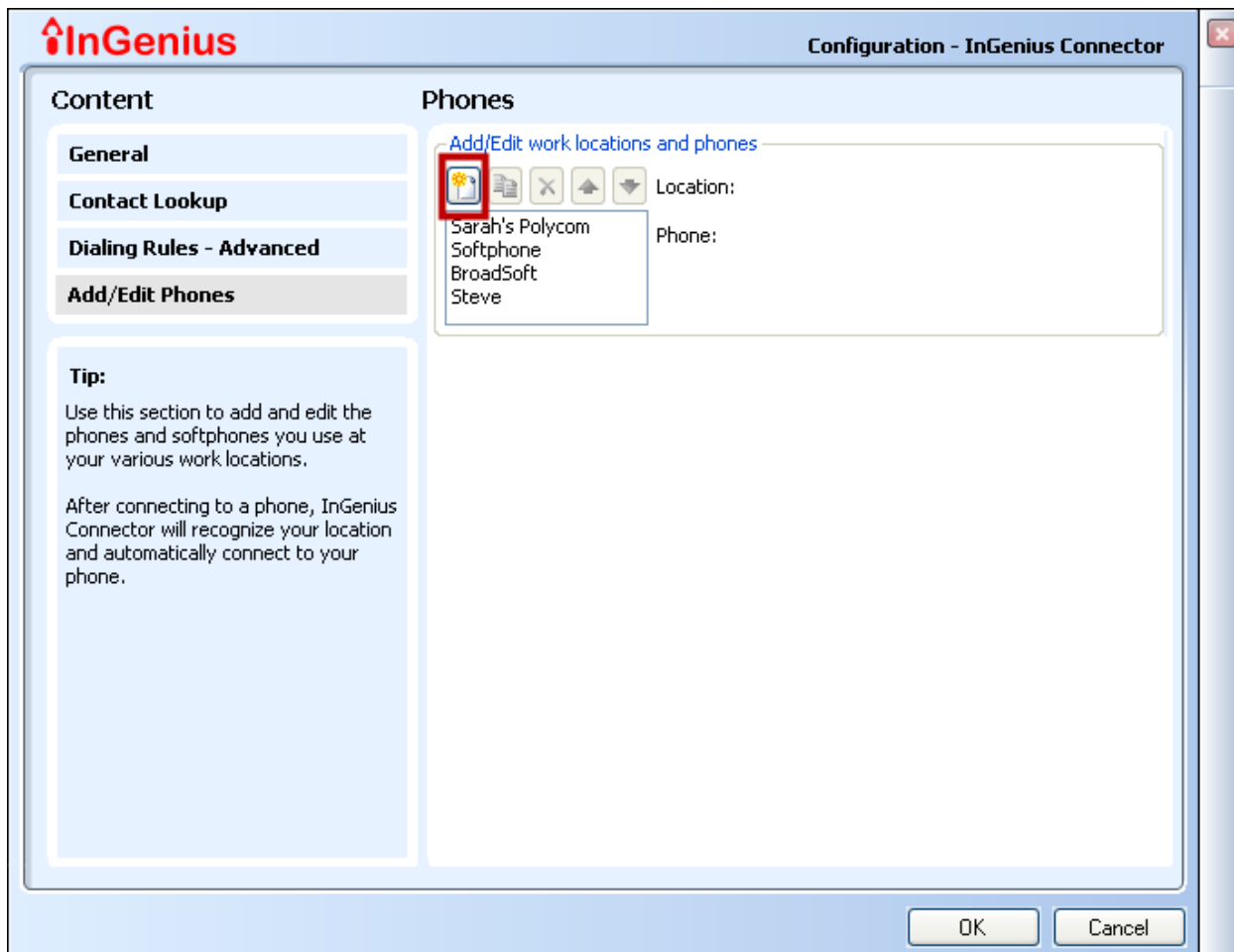
1. Visit : http://downloads.polycom.com/voice/voip/sip_sw_releases_matrix.html to find the latest supported firmware release for your phone
2. Under the Release column click on the software version you wish to install.
3. Save the file when prompted



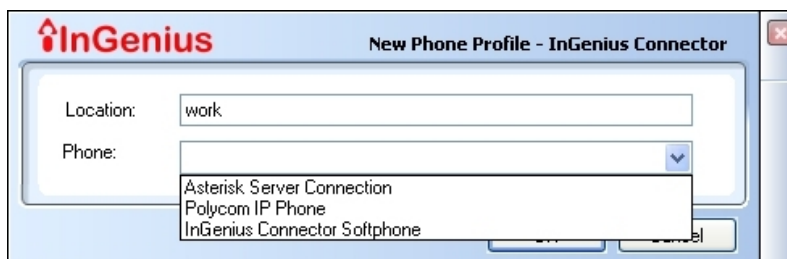
4. Find the saved file and open it. Copy all files to the phones FTP server.
5. Reboot the phone.
6. Once the phone is running again you need to "Send Settings to My Polycom Phone".

5.10 How to setup your Polycom phone through InGenius Connector

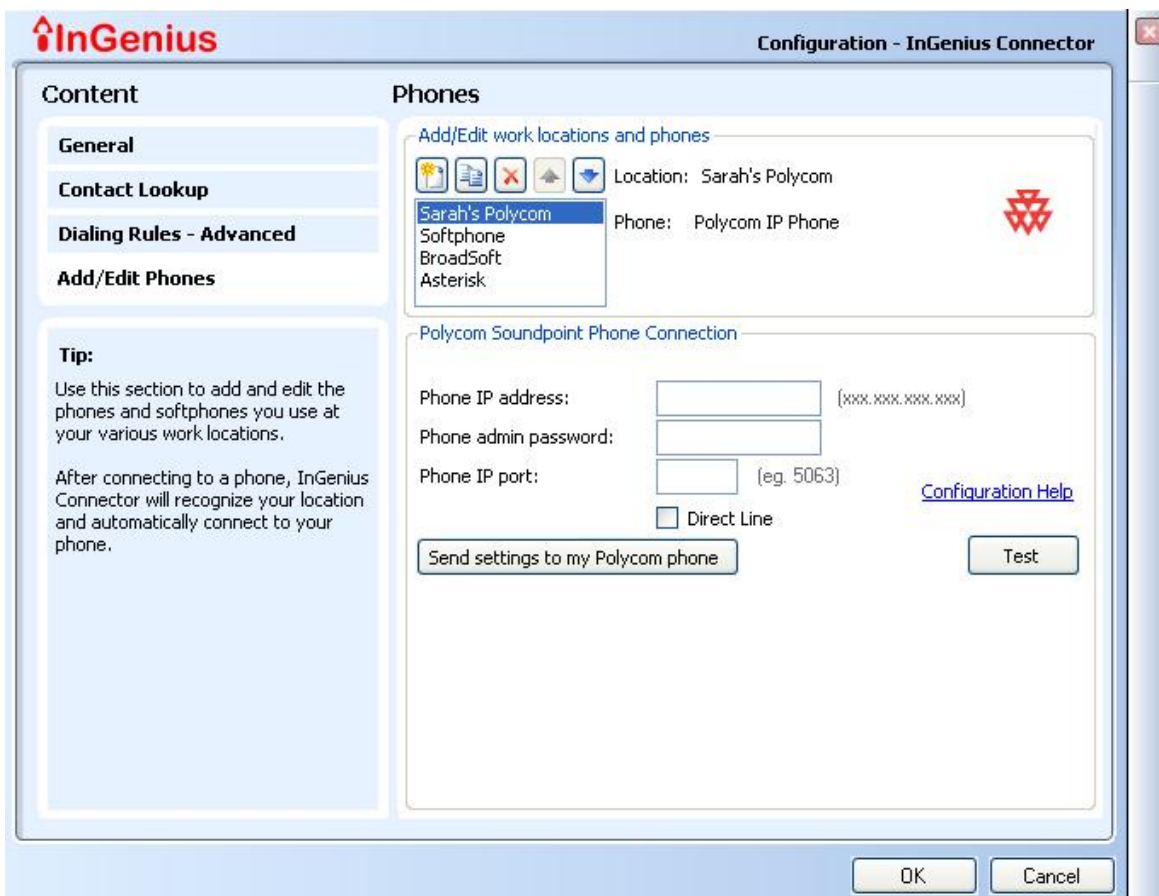
To associate InGenius Connector with your Polycom phone, you can use either the initial Configuration page (pictured at the start of this section) or the InGenius Connector Settings page pictured here:



1. On the “Add/Edit Phones” tab, select the “New Profile” Button:
2. Enter a name for you new phone and select Polycom IP Phone 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:

- **Phone IP address:** This is the actual IP of the phone you wish to connect to. To find out the IP address see the steps printed above.
- **Phone admin password:** This is the Administrator password to your Polycom phone. We will use when we check the current settings of the phone and if we need to make configuration requests to the phone. This must match the configured password on the phone. The default phone admin password set in phones straight from the factory is 456.
- **Phone IP port:** This is the local PC port that we will receive phone requests on. The entered port must NOT be blocked by your computers firewall. InGenius Connector defaults to port 5063. Your firewall must be configured to allow incoming traffic on this port.

 **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.

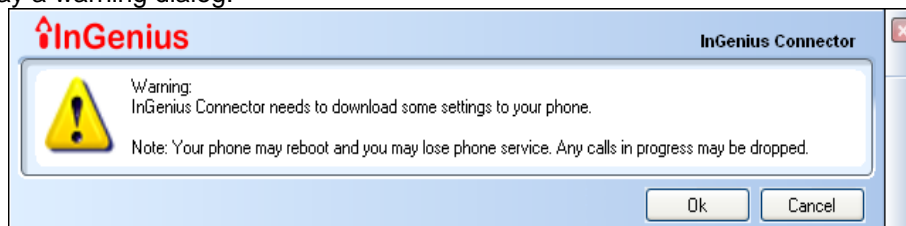
5. Once the settings have been entered you must update the settings on the phone.
6. Press the “Test” button to verify your settings.
7. Pressing “OK” to save your settings as a new profile.

5.11 Uploading Settings to Phone

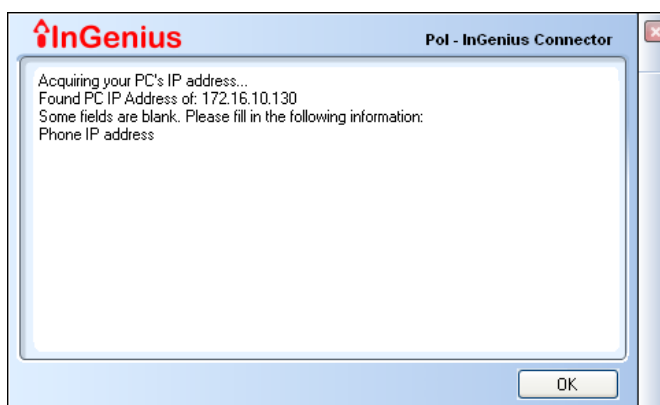
Once you have configured your profile we need to setup the Polycom phone to talk to InGenius Connector. This is done by downloading settings to the phone. Your connection will not work until you complete this step.

Pressing the “Send Settings to My Polycom Phone” will perform the following steps:

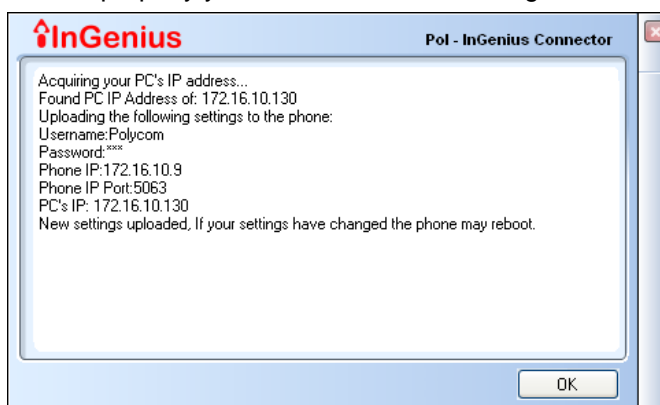
1. Display a warning dialog:



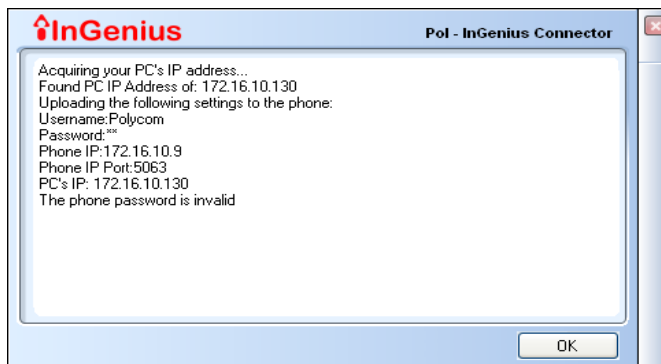
2. Pressing Cancel will abort the download operation. Pressing OK will try to send the settings to the phone.
3. Verify that the PC can talk to the phone.
4. Verify all settings are valid. If any settings are missing, you will be prompted to fill in the missing information.



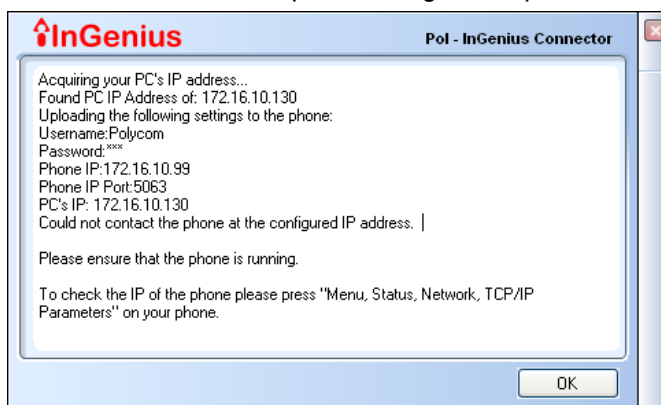
5. If the settings were sent properly you should see the following:



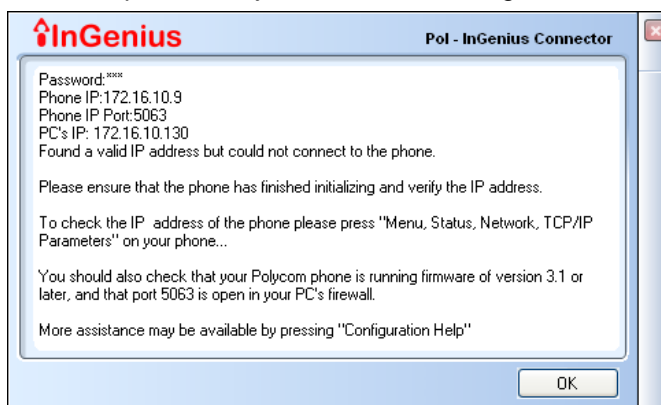
6. If InGenius Connector could not send the settings to the phone you will receive one of the following errors:
 - a. Bad Credentials
Possible fix: Reenter Username and password to the profile.



- b. **Bad Phone IP**
Possible fix: Check the IP of the phone using the steps above.



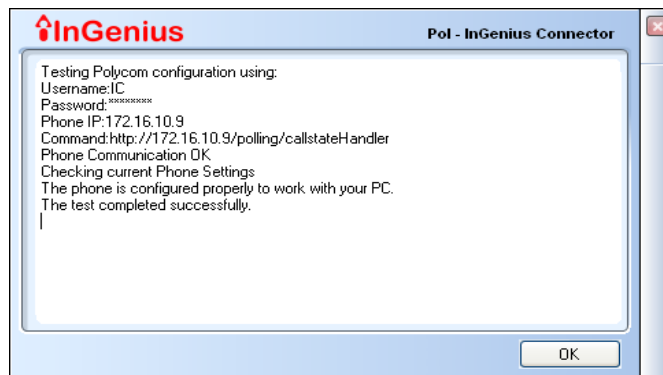
- c. **Phone has not finished Initializing or not proper settings**
Possible fix: If the phone has just finished rebooting wait 30 seconds and try again.



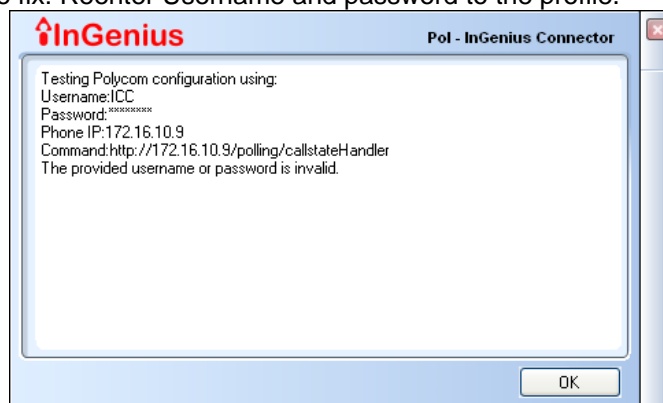
5.12 Testing a Polycom Connection

Once a phone has been configured you can press the “Test” button to verify the connection parameters.

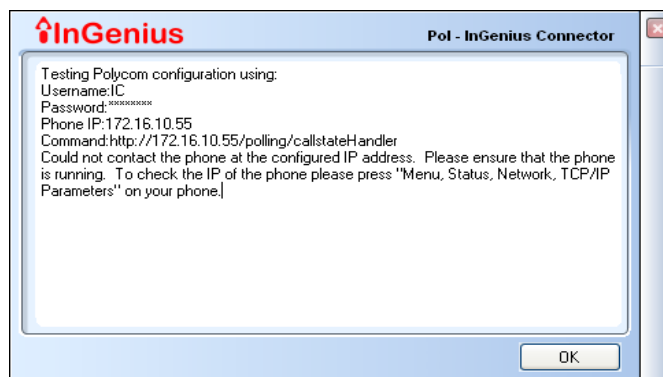
1. If the test completes successfully you will see the following message:



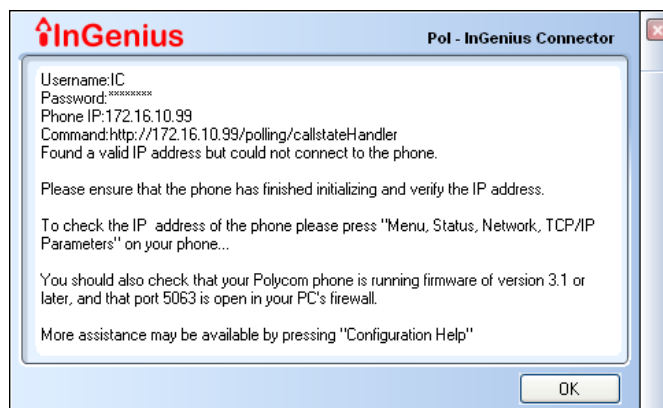
2. If the test did not complete successfully you will receive one of the following errors:
- Bad Credentials
Possible fix: Reenter Username and password to the profile.



- Bad Phone IP
Possible fix: Check the IP of the phone using the steps above.



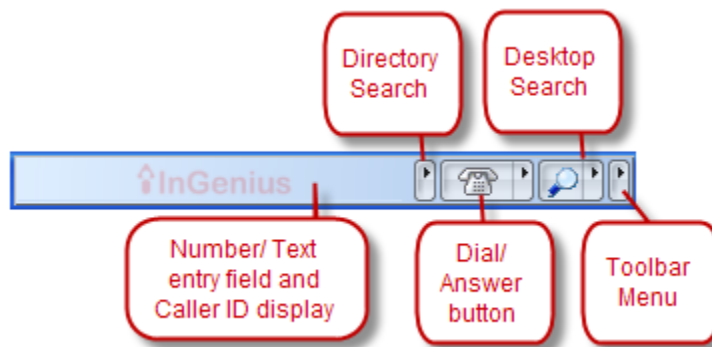
- Phone has not finished Initializing or not proper settings
Possible fix: If the phone has just finished rebooting wait 30 seconds and try "Send Settings to My Polycom Phone" again.



6 InGenius Connector Toolbar

All InGenius Connector features 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.

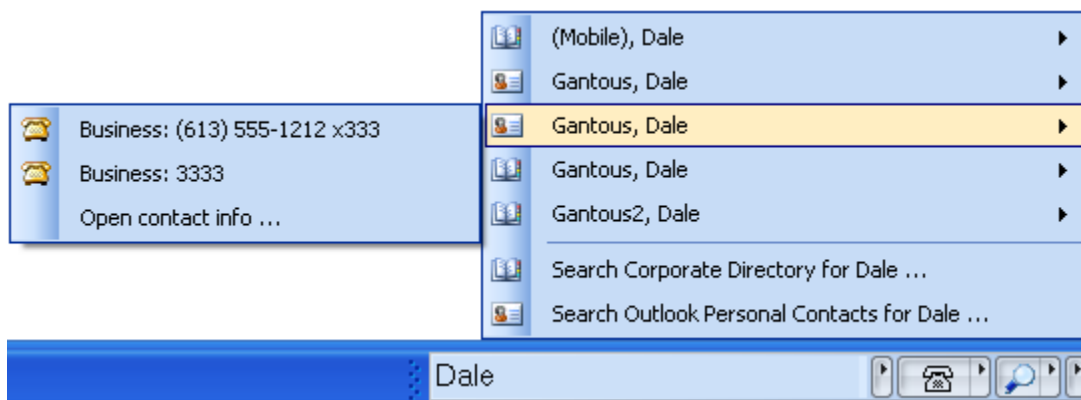
You will then see the toolbar GUI shown here:



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!

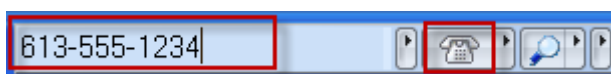


6.2 Dialing by Number

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.



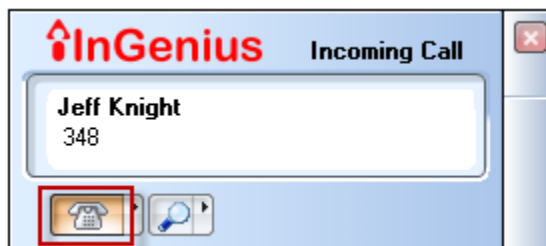
6.2.2 Dialing by Drag'n'Drop

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 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.

