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Introduction



This Configuration Guide is written as a general guide on how to configure the Poly 8300 Conference phone to work with PBXware 5.3.10.

Requirements

Identifying Phone Model

To start and successfully complete the registration of your Polycom phone you need to know which phone model to set up.

On the back of each Polycom phone, there is model information that you should check. Although various phone models can have exactly the same requirements and installation procedures, phone models can also have significantly different requirements and installation procedures, so that is why it is important to know the model you own which results in you setting up the device successfully.

Phone Firmware

- Make sure that your phone is loaded with an appropriate firmware version, [7.0.0.4265](#).

In order to check the firmware version:

- Press **Home**.
- Go to **Settings** and press **Select**.
- Go to **Status** and press **Select**.
- Go to **Platform** and press **Select**.
- Go to **Application** and press **Select**.
- Go to **Main** and press **Select**.

The firmware version is displayed under **Version**.

DHCP Server

Fully configured and operational DHCP server.

PBXware Version

PBXware version **5.3.9**

In order to find out the PBXware version:

- Log in to PBXware
- Navigate to **Settings: About**.

On the top of **About** page, you may see a code similar to this one **PBXware Edition: Multi-Tenant Release: 5.3.9.0 (41a4f0e6) Running: 13.23.1-gc-2e09fa3d, Proxy v5.3.9 (231c5f3), API: 5.3, libmemcached version: 1.0.18**, where Release denotes the current version of your PBXware.

Installation

This section describes how to install and connect the phone to the electrical power and data network as well as how to apply factory settings.

The following topics are covered:

- Power Adapter
- Power over Ethernet (PoE)
- Factory Settings

Power Adapter

Connect the Network and Power

- Connect the DC plug on the power adapter to the DC port on the phone and connect the other end of the power adapter into an electrical power outlet.
- Connect the Ethernet cable between the Internet port on the phone and the network port on a router or switch to access LAN.

NOTE: *If you are using Power over Ethernet (PoE), you don't need to connect the AC adapter. Make sure that the Ethernet cable and router or switch is Power over Ethernet (PoE) compliant.*

Power over Ethernet (PoE)

Connect the Network (only)

Using a regular Ethernet cable, your phone can be powered from a Power over Ethernet (PoE) compliant router or switch.

- Connect the Ethernet cable between the Internet port on the phone and an available port on

the in-line power router or switch.

NOTE: *If you are using Power over Ethernet (PoE), you don't need to connect the AC adapter. Make sure that the Ethernet cable and router or switch is Power over Ethernet (PoE) compliant.*

Find the phone IP address

Find out your Polycom Trio phone's IP Address.

- Press **Home**.
- Go to **Settings** and press **Select**.
- Go to **Status** and press **Select**.
- Go to **Platform** and press **Select**.
- Go to **Phone** and press **Select**.

The IP address will be displayed on the top of the display.

Reset to Factory Settings

This step is not required for out-of-the-box phones, however, if the phone has been already used, then it is a must.

- Press **Home** and press **Select**.
- Go to **Settings** and press **Select**.
- Go to **Advanced** and press **Select**.
- Enter the password (The default password is **456**) and press **Enter**.
- Go to **Administration Settings** and press **Select**.
- Go to **Reset to Defaults** and press **Select**.
- Go to **Reset To Factory** and press **Select**.
- Wait some time for a device to reboot.

NOTE: *Do not unplug or remove power from the phone while it is updating firmware and configuration..*

Registering Phone

This section describes how to identify the Polycom phone model, requirements that must be met, and how to register a phone using Manual configuration or Auto provisioning.

The following topics are covered:

- Manual Configuration
- Auto Provisioning

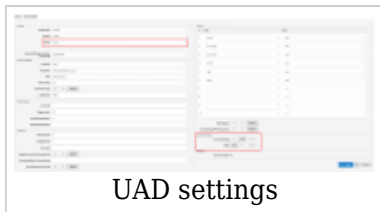
Manual Configuration

This section describes how to set UAD settings, create the PBXware Extension, and register the phone.

The following topics are covered:

- UAD Settings
- Creating an Extension
- Registering a Phone

UAD Settings



Log in to the PBXware's web administration interface

- Open a new browser window and enter the IP address in order to access the PBXware web administration login screen. Example: **http://192.168.1.10**.
- Log in to PBXware with your e-mail address and password.

UAD Settings

- Navigate to **Settings: UAD**.
- Make sure that the Polycom UAD is enabled. To check the UAD status, click the **Edit** icon corresponding to your Polycom phone.
- Make sure that **Status** is set to **Active**, **Auto provisioning** is set to **No**, and **DHCP** is set to **Yes**.
- Click the **Save** button to save changes.

Creating an Extension



Add the Extension

- Navigate to **Extensions**. Click the **Add Extension** button.
- The standard options window will be shown below.
- Select the Polycom phone model from the **UAD** select box.

- Select Location: **Local** or **Remote**.

Local is for all Extensions registered on the LAN and **Remote** is for all Extensions registered from remote networks, WAN, Internet etc.

- Click the **Next step** button.

Extension Values

Enter values into the required field text boxes.

REQUIRED FIELDS:

- **Name**

Enter a name for the Extension being created. Example: **John Smith**.

- **E-mail**

Enter the e-mail address associated with this Extension. This e-mail address will receive all system notification messages. Example: **john.smith@bicomsystems.com**

- **Department**

Define the Department to which the Extension belongs to. Example: **Sales**.

- Click the **Save** button.

Registering a Phone

This section describes how to register a Polycom phone using **Hostname or IP Address** or **DNS SRV**.

The following topics are covered:

- Hostname or IP Address

Registering a Device

Line configuration from the device's web interface

To access the web interface of the Polycom phone, users must know its IP address.

To find the IP address, please do the following:

- Press **Home**.
- Go to **Settings** and press **Select**.
- Go to **Status** and press **Select**.
- Go to **Network** and press **Select**.
- Go to **TCP/IP Parameters** and press **Select**.

The IP address will be displayed under **IP**.

Following this, please enter the phone's **IP address** into a web browser. If everything is done successfully, a message saying **Password prompt** should be displayed.

If the device uses the factory defaults, the password should be **456**.

NOTE: Please note that depending on the Polycom device and its firmware, the web interface settings may vary.

- After a successful login, select **Simple Setup**.
- Navigate to the **SIP Server** group.
- Enter the PBXware's IP address into the **Address** field.
- Enter **5060** into the **Port** field.
- Navigate to **IP Line Identification**.
- Enter the Extension into the **Address** field.
- Enter the Extension into the **Authentication User ID** field.
- Enter the Extension Secret into the **Authentication Password** field.
- Press **Save**.

The phone should register after a couple of seconds. If not, please reboot the phone.

B) Line configuration on the device

- Press **Home** on the phone.
- Go to **Settings** and press **Select**.
- Go to **Advanced** and press **Select**.
- Enter **password** and press **Enter**. Please note that the factory default password is **456**.
- Press **Select** to enter **Administration Settings**.
- Go to **Line Configuration** and press **Select**.
- Go to **Line 1** and press **Select**.
- Go to **Address** and press the **Edit** button.
- Enter the PBXware's Extension number and press **OK**. Example: **1003**.
- Go to **Authentication** and press **Select**.
- Go to **User ID:** and press the **Edit** button.
- Enter the PBXware's Extension number and press **OK**.
- Go to **Password** and press the **Edit** button.
- Enter the PBXware's Extension Secret and press **OK**. (E.g. **%3DfChBz59**)

- Press **Back** three times.
- Press **Select** for **Save Config**.
- Press **Home** on the phone.
- Go to **Settings** and press **Select**.
- Go to **Advanced** and press **Select**.
- Enter **password** and press **Enter**. Please note that the factory default password is **456**.
- Press **Select** to enter **Administration Settings**.
- Go to **Call Server Configuration** and press **Select**.
- Press **Select** to enter **SIP**.
- Press **Select** to enter **Server 1**.
- Press **Edit** to edit **Address**.
- Enter the PBXware's IP address and press **OK**. (E.g. **192.168.8.185**)
- Press the **Back** button three times.
- Press **Select** for **Save Config**.
- If everything is done as described above, you should have successfully registered your phone to PBXware.

Dial ***123** to verify registration.

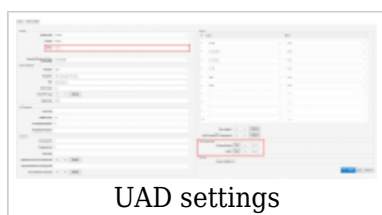
Auto Provisioning

This section describes how to set UAD settings, create the PBXware Extension, and register the phone using DHCP or Static IP address.

The following topics are covered:

- UAD Settings
- Creating an Extension
- Registering a Phone

UAD Settings



UAD settings

Log in to the PBXware's web administration interface.

- Open a new browser window and enter the IP address in order to access the PBXware web administration login screen. Example: **http://192.168.1.10**.

- Log in to PBXware with your e-mail address and password.

UAD Settings

- Navigate to **Settings: UAD**.
- Make sure that the Polycom UAD is enabled. To check the UAD status, click the **Edit** icon corresponding to your Polycom phone.
- Make sure that **Status** is set to **Active**, **Auto provisioning** is set to **Yes**, and **DHCP** is set to **Yes**.
- Click the **Save** button to save changes.

Creating an Extension



Add the Extension

- Navigate to **Extensions**. Click the **Add Extension** button.
- The standard options window will be shown below.
- Select the Polycom phone model from the **UAD** select box.
- Select Location: **Local** or **Remote**.

Local is for all Extensions registered on the LAN and **Remote** is for all Extensions registered from remote networks, WAN, Internet etc.

- Click the **Next step** button.

Extension values

Enter values into the required field text boxes.

REQUIRED FIELDS:

- **Name**

Enter a name for the extension being created. Example: **John Smith**.

- **E-mail**

Enter the e-mail address associated with this extension. This e-mail address will receive all system notification messages. Example: **john.smith@bicomsystems.com**

- **Auto Provisioning**

Set to **Yes**.

- **MAC Address**

Enter Polycom phone MAC address. Example: **001565FF1536**. MAC address can be found at the back of the phone.

- Click on the **Save** button.

Registering a Phone

This section describes how to register a Polycom phone using **DHCP, TFTP, HTTP & HTTPS** or **DNS SRV**.

The following topics are covered:

- DHCP
- TFTP or HTTP & HTTPS
- DNS SRV

DHCP

Configure DHCP

- Make sure that the DHCP router is configured to use **option 66** to automatically instruct phones with the URL for auto-provisioning. For more information, please see the router documentation or contact a network administrator.

Phone's first boot or user-initiated reboot

- The auto-provisioning process will start during the phone's first boot or after the reboot process has been initiated by the user. The DHCP server will instruct the phone from where to pick up an appropriate configuration file. If everything is done as described above, you should have successfully registered the phone to PBXware.

Dial ***123** to verify registration.

TFTP or HTTP & HTTPS

Network Configuration

- Open a new browser window and enter the phone's IP address. (E.g. **https://192.168.1.22**)
- Enter **password** and press **Submit**. **NOTE:** The factory default password is: **456**.
- Click the **Settings** tab.
- Click the **Provisioning Server** link under the **Settings** tab .
- Choose what **server type** you intend to use: **HTTP, HTTPS** or **Trivial FTP**. **NOTE:** Our recommendation is to use **HTTP**.

If you choose to use **server type HTTP** or **HTTPS** enter **http://** or **https://** followed by **Hostname** or **IP Address** then followed by **/prov**.

Example of a Hostname using HTTP: **http://abc.bicomsystems.com/prov**

Example of a Hostname using HTTPS: **https://abc.bicomsystems.com/prov**

Example of an IP Address using HTTP: **http://192.168.1.10/prov**

Example of an IP Address using HTTPS: **https://192.168.1.10/prov**

- Enter **Auto Provisioning** username and password into **User Name** and **Password** fields.

If the **Server Type** is **TFTP**, enter **Hostname** or **IP Address**.

Example of a Hostname: **tftp://voip.bicomsystems.com**

Example of an IP Address: **tftp://192.168.1.10**

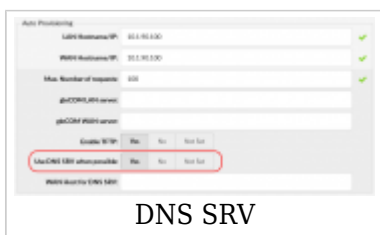
- Click **Save** and confirm by pressing **Yes**.

Wait some time for a device to reboot.

The auto-provisioning process will start during the phone's reboot process. The phone will pick up an appropriate configuration file from PBXware. If everything is done as described above, you should have successfully registered your phone to PBXware.

Dial ***123** to verify registration.

DNS SRV



DNS SRV

This section describes how to use a **DNS SRV** record which specifies the location of PBXware.

NOTE: *The DNS Server needs to be configured correctly for this to work. Bicom Systems can provide a service to set this up for you.*

Check if the DNS SRV is enabled in PBXware

- Contact a PBXware administrator to find out if the **DNS SRV** is enabled in PBXware. In case you have access to PBXware, you can check this yourself.
- Open a new browser window and enter the IP address in order to access the PBXware's web administration login screen. Example: **http://192.168.1.10**.
- Log in to PBXware with the e-mail address and password
- Navigate to **Settings: Servers** and click **Edit**.
- In **Auto Provisioning group**, make sure **Use DNS SRV when possible:** is set to **Yes**. If it is set to **No** or **N/A**, set to **Yes** and click **Save**.

NOTE: *User have to re-save all their Extensions configured for Auto Provisioning.*

Configure Line

- Press **Menu** on the phone.
- Scroll to **Settings** and press **Select**.
- Scroll to **Advanced** and press **Select**.
- Enter **password** and press **Enter**. Please note that the factory default password is **456**.
- Press **Select** to enter **Admin Settings**.

- Go to **Line Configuration** and press **Select**.
- Go to **Line 1** and press **Select**.
- Go to **Server 1** and press **Select**.
- Press **Edit** to edit the **Address** line.
- Enter the Hostname. (Example of a Hostname: **abc.bicomsystems.com**) Please make sure to replace the Hostname from this example with your PBXware's Hostname.
- Make sure that the DNS server is configured to automatically route a registration request to PBXware which is actually under another domain name, for example: **abc.bicomsystems.com**.
- Go to **Authentication** and press **Select**.
- Press **Edit** to edit **User ID**.
- Enter the PBXware's Extension number and press **OK**. Example: **1003**.
- Go to **Password** and press **Edit**.
- Enter Extension Secret as received in the e-mail associated with this Extension and press **OK**. Example: **%3DfChBz59**.
- Press **Back** twice, then press **Select** to **Save Configuration**.
- The auto provisioning process will start during the phone's reboot process. the phone will pick up an appropriate configuration file from PBXware. If everything is done as described above, you should have successfully registered the phone to PBXware.

Dial ***123** to verify registration.

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