Mastering the ShoreTel IP Communication System

Basic Training Syllabus
Objectives of the class:

Understanding new technology can at times appear challenging. However, implementation of a ShoreTel IP system – which combines the telephone with your PC – enhances your ability to handle calls easily and effectively. The Personal Call Manager allows you to completely control how and when you receive your calls while offering your callers the fastest service possible.

At the end of this class you will be able to identify and use all basic features and functions of the telephone as well as implement the more advanced call controls afforded by the Personal Call Manager.

Class Outline:

This class is designed to provide an interactive demonstration of the call handling functions and ensure that each user has the optimal learning experience. We invite your comments and questions.

The Physical Phone:

- Telephone layout
- Make and receive calls
- Place calls on hold and retrieve calls from hold
- Transferring calls (blind and warm transfer)
- Conference calling

Voice Mail:

- Logging in
- Retrieving messages
- Saving messages
- Forwarding messages
- Creating and sending messages
- Deleting/Un-deleting messages
- Logging out

Personal Call Manager (PCM):

- PCM interface
- Windows, Viewers & Menus
- Changing extension assignment
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The Physical Telephone
Getting Started:

Welcome to your ShoreTel™ IP phone! Your phone has many unique features, including an intuitive visual interface, custom keys, quick dialer directory, call handling modes for when you do not want to be disturbed, conferencing, and much more.

- **TFT-LCD Color Display**
  - 2.7 inch
  - 320 x 240 pixels
- **Scroll Button**
  - Select options in interface.
- **Soft Keys**
  - Context-sensitive functions defined on display.
- **indicator LED**
  - Flashing light alerts the user to incoming calls and unheard voice messages.
- **Custom Keys**
  - Six custom keys with tri-color LED indicators can be configured as call keys, monitored extensions, or speed dial keys.
- **Audio Control Keys**
  - Volume button controls handset, headset, speaker, and ring volume. Mute, Speaker, and Headset keys illuminate when functions are active.
- **Function Keys**
  - Perform core telephony functions.
- **Microphone**
RINGING AND LISTENING VOLUME

Pressing the ↑ or ↓ Volume button you can adjust the volume of your phone’s ringer while the handset is on hook or the listening volume while the handset is off hook. Also, the speaker volume can be adjusted by pressing the Volume buttons.

RING TONES

You can select from several different ring tones by selecting the OPTIONS button, enter your password followed by #, select 3 then press EDIT. Your display will list the four different Ring Tones available. Select ring to hear their sound then OK to select the Ring Tone. Press DONE to complete the update.

PLACING CALLS

Using the Handset

To place an internal call, pick up the handset and dial the extension. To place an external call, dial 9, then the phone number. To end a call, hang up the handset.

Using the Speakerphone

To place an internal call, press the Speakerphone button and dial the extension. To place an external call, dial the trunk access code 9, then the phone number. To end a call, press the Speakerphone button again.

HOLD

To place a call on hold, press the Hold button. On the ShoreTel 230/265/560 phone(s), the custom key blinks orange or green, at which point you can safely place the handset on hook (or press the speaker or headset button) without ending the call. To take the call off hold, press the custom key with the blinking LED, or press the Hold button again.

If you are not on another call while a call is on hold, you will hear a reminder ring in 15 seconds and at one-minute intervals after that. If you have received several calls, you will receive a reminder ring for the call that has been on hold the longest.
REDIAL
This button enables you to view the last numbers you entered into the dial pad – either internal or external. Lift the handset, press the Redial button, scroll to the extension or number you wish to call then select DIAL. Hang up to end the call.

MUTING A CALL
Press the Mute button so the caller doesn’t hear you. The LED on the Mute button turns red when the mute is active.

DIRECTORY
Press the button to access your company directory. Using the Dial Pad you can spell the person’s first or last name. Select the Dial or Intercom soft key/button.

TRANSFERRING A CALL
To transfer a call from your extension to another number:

Step 1  Press the Transfer button. The call is put on hold.
Step 2  At the prompt, dial the number (or press the extension's custom key, or use the Directory to find the party), then do one of the following:
   a  Complete a blind transfer by hanging up or by pressing the Transf soft key.
   b  Speak to the recipient before transferring by pressing the ConsIlt soft key. After consultation, press the Yes soft key to complete the transfer, or press the Cancel soft key to abandon the transfer and return to the original call.
   c  Consult by intercom by pressing the More soft key, and then pressing the Intcom soft key.
   d  Send the call to the recipient’s voice mailbox by pressing the More soft key, and then pressing To MB.

MAKING A CONFERENCE CALL
You can conference up to six people (which includes yourself) into a connected call by following these steps:
Step 1  Press the **Conference** button. The call is put on hold.

Step 2  Dial the extension of the party you would like to conference

Step 3  Press the **Confrn** soft key to ring the party directly.

   or

Dial the number and press the **ConsIt** soft key to speak with the recipient before ringing him or her into the conference call. After consultation, press the **Yes** soft key to complete the conference call, or press the **Cancel** soft key to return to the original two-party call.

Step 4  Repeat to add additional parties.

**PAGING**

If you have access to the paging function (set by your administrator), dial the number given to you and wait for the confirmation tone, then begin speaking into the handset. Hang up when you are finished.

**CALL WAITING**

If you receive an incoming call while you are on another line, you’ll hear a beep on the call. To answer the incoming call and put the current call on hold, press the Hold button then the blinking key of the incoming call.

**CALL PARK**

You can park a connected call on your extension to be picked up at another extension by doing the following:

   Step 1  Press the PARK soft key. The call is put on hold.
   Step 2  Enter “Park Destination” which is the extension. Press PARK again.
   Step 3  Lift the handset at the extension to retrieve the parked call.
USING VOICE MAIL

A steadily flashing light on your phone’s right-most upper corner and stutter dial tone signifies that you have unheard messages. The number of unheard messages appears on the idle screen of your phone’s display by the icon 📞.

Logging Into the Main Menu

To log in to the main voice mail menu, press the [Voice Mail] button, then dial your password followed by # (Your default password is 1234.)

Logging In from Another Extension

To log in to the main voice mail menu from another extension, press the [Voice Mail] button, followed by ##, then your extension, followed by your password, and then #.

Logging In from an External Phone

To log in to the main voice mail menu from an external phone, dial your personal number, wait for your greeting, press * then, #, enter your extension number followed by your password, then #

1 Listening to and Interacting with New Messages

From the Main Menu, you can listen to and replay new messages by pressing 1. To interact with new messages, press one of the following:

1  Replay the message
2  Save the message
3  Delete the message
4  Forward the message
After recording the prefacing remark, press:

- #  Accept
- 1  Review
- 2  Re-record
- *  Cancel recording

5  Reply to the message

Choose one of the following:

- 1  Reply with a voice message
- 2  Reply with a call back
- *  Return to previous menu

6  Hear the message envelope
7  Move Backward (rewind the message several seconds)
8  Pause
9  Move forward (fast forward the message several seconds)
0  Press 0 again to transfer to the operator
#  Skip to next message
*  Cancel review

2  Sending Messages from Voice Mail
From the Main Menu, you can send messages by pressing 2.
The following options are available while recording your message:

- *  Cancel
- #  Finished recording
- 1  Review
- 2  Re-record

After you are satisfied with your recording, you will be prompted to enter the recipient’s extension.
LOGGING IN

If you are using your phone for the first time and no extension has been assigned, the phone’s display shows “Available.” You can place calls but not receive them. You need to log in, change your password, record your name, and assign your extension to this phone. To log in:

**Step 1** Press [VOICE MAIL

**Step 2** Enter the extension number assigned to you by your system administrator.

**Step 3** If your system administrator assigned you a password, enter it now (otherwise enter a default password of 1234), and press #.

**Step 4** Enter a new password followed by #. Check with your system administrator for password length. Repeat to confirm password.

**Step 5** Speak your name and press #, then press one of the following options:

- # Accept
- 1 Review
- 2 Re-record
- 3 Delete
- * Cancel

**Step 6** To assign your extension to this phone, press 7 for voice mail options, and then press 3 to re-assign the extension. Then, press 1.
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The Personal Call Manager
What is Call Manager?

Call Manager is the ShoreWare client application that manages a user’s calls, voice mail, and personal system settings through a graphical user interface.

ShoreTel Call Manager is the easiest way to communicate efficiently with your colleagues and work partners. Call Manager offers a set of productivity tools for better communication whether you are a standard user, an operator, whether you are working from home, on the road or based in an office. This lesson will help you find your way around this software.

Below is an illustration of the Call Manager window:
Control Buttons

You can control a call from the Call Manager interface by clicking on the buttons in the Active Call Window.

Options are shown below:

<table>
<thead>
<tr>
<th>Call Control Buttons</th>
</tr>
</thead>
<tbody>
<tr>
<td>📞 Answer</td>
</tr>
<tr>
<td>🔗 Hang up</td>
</tr>
<tr>
<td>🎶 Hold</td>
</tr>
<tr>
<td>🔗 Transfer</td>
</tr>
<tr>
<td>🔗 Conference</td>
</tr>
<tr>
<td>📝 Call Notes</td>
</tr>
</tbody>
</table>
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Where Can I Get More Help?
Help is Just a Click Away!

A lot of resources are available to assist you to get the most from your new ShoreTel IP system. You can:

Call us for help at 412-489-1100

Visit ShoreTel’s online video training – this interactive audio and video site has extensive training tools you can view 24 hours a day:

http://support.shoretel.com/training/