# ATTENTION:

These are important instructions for the new Personal Call Manager software that complements our new phone system. Please read them thoroughly before calling IT Services for assistance.

We have set the software so that it should automatically install and run when you first log in.

IF THE PROGRAM LAUNCHES LIKE THE SCREEN BELOW, FOLLOW THE ATTACHED INSTRUCTIONS.
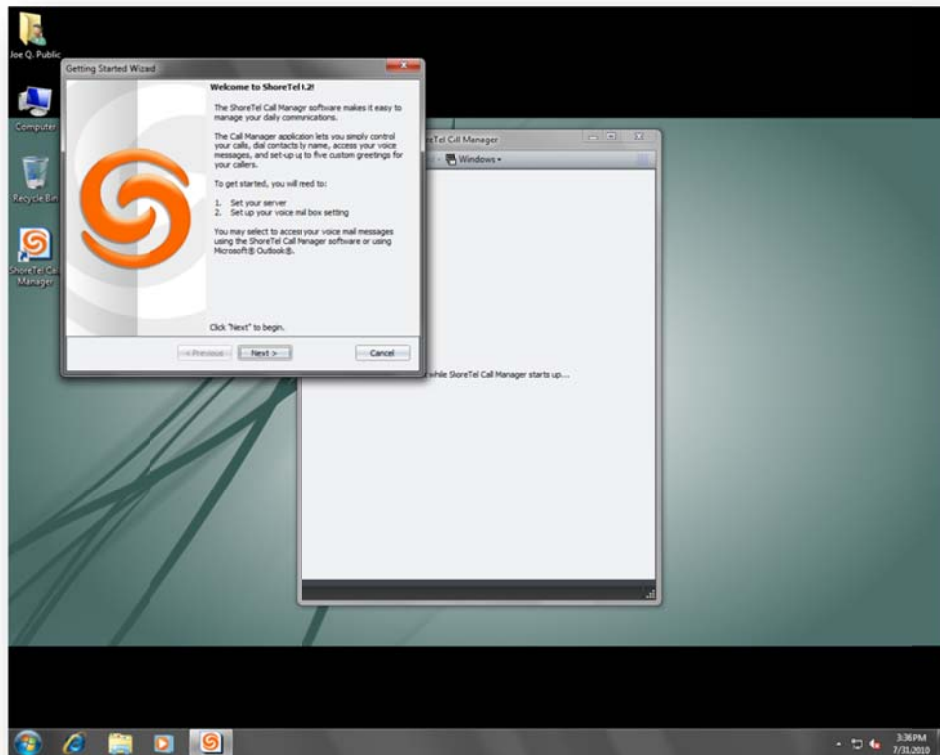
PLEASE TAKE THE FOLLOWING STEPS BEFORE CALLING IT SERVICES IF THE SCREEN ABOVE DOES NOT SHOW UP WHEN YOU FIRST LOG INTO YOUR COMPUTER.

1. Reboot your computer and try logging in again.
2. Once you have logged into your computer the second time, if you do see the Shoretel Call Manager icon on your desktop, wait for about one minute to see if the program starts automatically. If it does not, double-click the Shoretel Call Manager icon and follow the attached instructions.
3. Once you have logged into your computer the second time, if you **do not** see the Shoretel Call Manager icon on your desktop, please contact IT Services for assistance at **extension 3164**.

Congratulations, you are ready to configure and start using our brand new software that accompanies our brand new phone system. This software is an important tool that can be used to simplify the use of your phone, give access to important information about co-workers, and let them know about your availability as well. Used well, this application can make you more efficient. In order to start using the Personal Call Manager application, a few simple steps are required to get it configured. Follow these simple instructions, and you should be ready to go. If you have any issues or need assistance, feel free to contact IT Services by calling extension 3164.
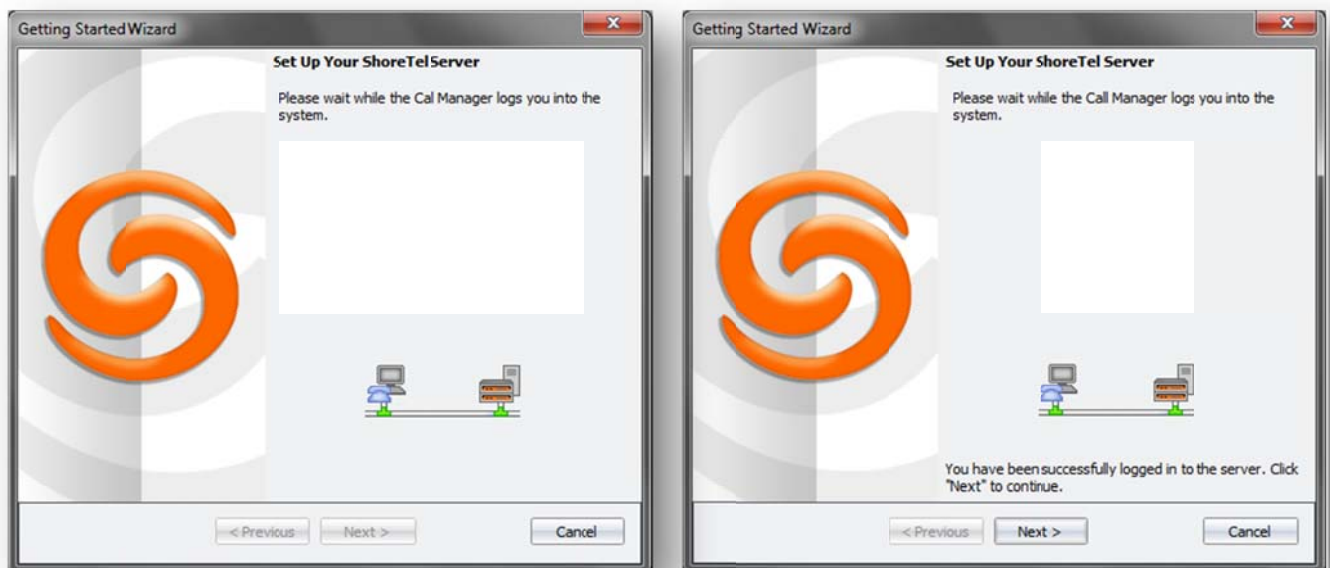
STEP 1: Getting Started:

On the "Welcome to ShoreTel" screen simply click "Next."

STEP 2: Setting the Server
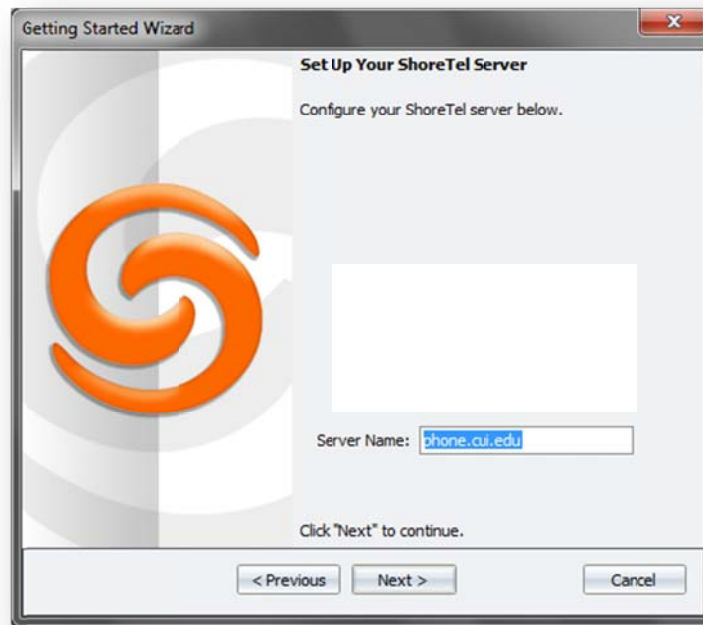
On the "Set Up Your ShoreTel Server" page, it should already show "phone.cui.edu" in the server name, if not, type it in and click "Next."

STEP 3: Connecting

Once you have clicked next it will take a few seconds and you should see a message showing successful connection. If the connection is successful, click "Next". **If it fails, contact IT Services at ext. 3164.**

STEP 4: Configuring Outlook

On the "Configure Outlook Integration" screen you will need to **UNCHECK** the "Display my voice messages in my inbox" checkbox. This feature requires some specific configuration which will be done by IT Services. If you leave the checkbox checked, you might receive errors.

Make sure the screen looks like the above picture before clicking "Next."

IMPORTANT NOTE: ERRORS

If you see any of the following messages, you failed to uncheck the checkbox for email integration. Simply click "No" or "OK" or "Cancel" to close them. Outlook Integration will be enabled by IT Services, so these errors can be safely ignored.
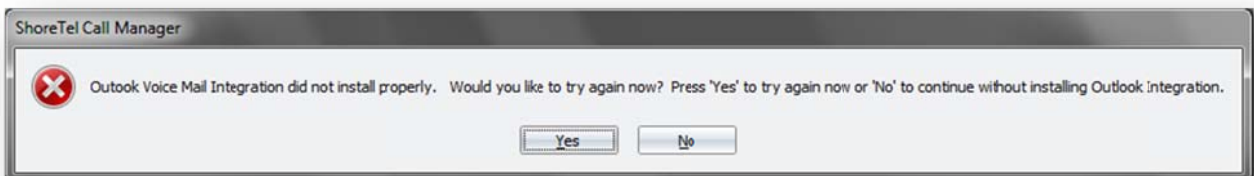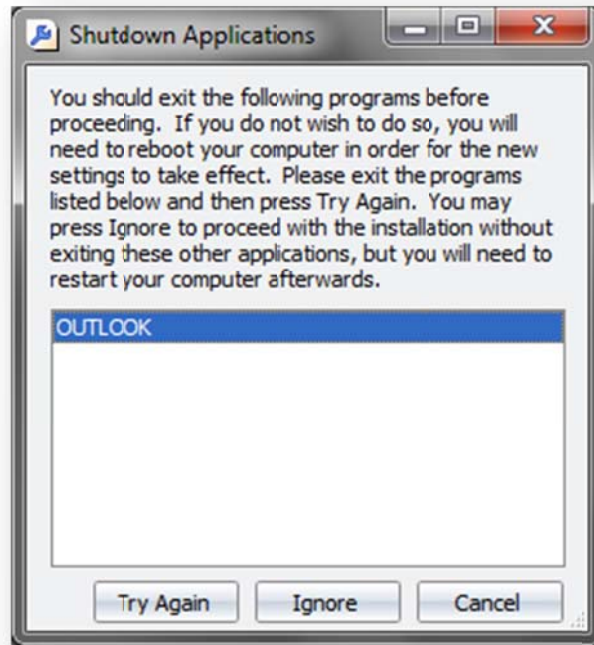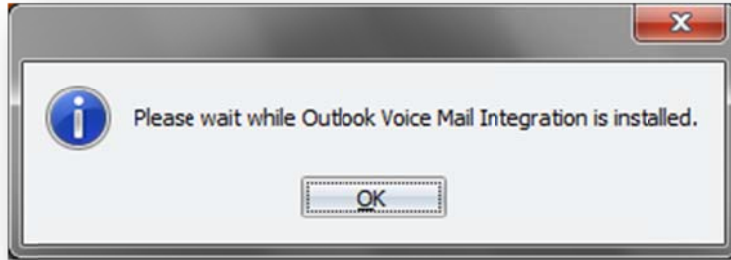
STEP 5: Finishing Up

Make sure the checkbox remains checked to run the Shoretel Call Manager at logon in order to get full featured use, and then click "Finish."
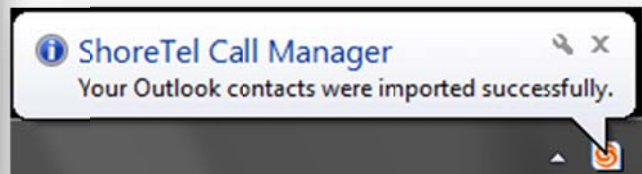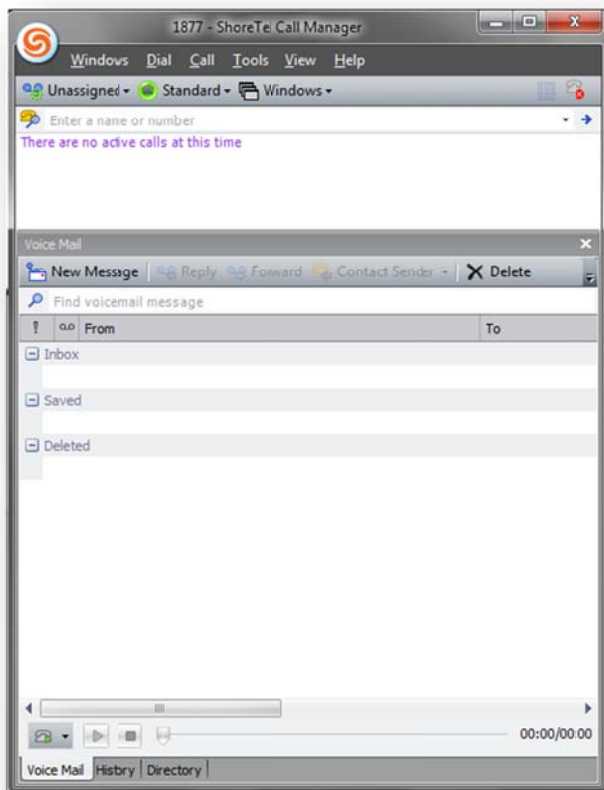
You should see the Personal Call Manager open, and within a few minutes a balloon in your system tray should show you that your contacts have been imported.

ShoreTel Voice Mail Quick Reference

VOICE MAIL OPERATIONS
(Instructions for Voice Mail owners)

New Voice Mail Indicators

Your voice mailbox contains unplayed messages if:

- You hear a stutter tone on the handset.

  OR

- The phone's message waiting light flashes.

Checking Voice Mail

To check voice mail from your extension

1 Press **Voice Mail** or lift the handset and press **#**.
2 At the prompt, use the dial pad to enter your password. (If you have not been assigned a password, use the default password, **1234**.)
3 Press **#**.

NOTE If you are logging in for the first time, the system prompts you for a new password and asks you to record your name.

To check voice mail from another extension

1 Press # twice.
2 Enter your extension.
3 Enter your password.
4 Press #.

To check voice mail from an external phone

1 Dial your voice mail access number.
2 Press #.
3 Enter your extension.
4 Enter your password.
5 Press #.

Listening To Messages

At the Main Menu prompt, press **1**. The voice mail system plays urgent messages first, then newly arrived messages.

The system gives the delivery date and time for each message. (You can disable this feature from the Mailbox Options Menu.)

Managing Messages

After listening to a message, you can replay it, send a reply to the person who left the message, forward it to someone else, replay the date and time information, save it, or delete it.

To replay all of your saved messages

- Press **3** at the Main Menu prompt.

As a safeguard against accidental erasures, the system retains deleted messages for a few hours.

To listen to your deleted messages

1 Press **7** at the Main Menu prompt.
2 Press **7**.

Voice mail plays all the deleted messages still available to the system. During playback, you can manage deleted messages as if they were newly arrived messages.

To restore a deleted message

- Press **2**.

To send a recorded message from voice mail

After recording a message, voice mail asks you to supply an address.

1 Address the message to individual recipients by entering their extension numbers.
2 Specify groups of recipients by entering a distribution list number.

To identify a recipient by name, specify a personal distribution list, or broadcast to all extensions, press **0** and follow the prompts.

To mark a message as urgent

- After addressing the message and confirming the addressee(s), press 1.

To forward the message you're reviewing

1 Press **4** and follow the recorded prompts.

To reply to the message you're reviewing

1 Press **5** and follow the recorded prompts.
2 Press **1** to reply with a voice mail, press **2** to reply with a call back, or press **3** to reply to all with a voice message.

Changing Mailbox Options

Personalize your voice mail by changing your name, password, or personal greeting.

To change personal settings from the Main Menu, press **7** and follow the recorded prompts.

Changing Extension Assignment

If you have the proper permission, you can assign your extension to any phone on the system.

1 Log in to voice mail from the target phone—an extension other than your own.
2 At the Main Menu prompt, press **7**.
3 Press **3** to re-assign the extension.
4 Press **1** to assign the extension.
5 Press **2** to un-assign the extension. (The phone reverts to its original extension.)

Setting Call Handling And Forwarding

NOTE Use ShoreWare Call Manager to configure the modes with different call forwarding destinations and personal greetings.

You can set one of five distinct call handling modes for your extension. When you record a personal greeting, it is linked to the active call handling mode.

To enable one of the five distinct call handling modes:

- Press **7** at the Main Menu prompt.
- Press **2**, then follow the prompts.

Enabling FindMe

To enable or disable FindMe Forwarding so that callers can forward their calls to your destination:

- Press **7** at the Main Menu prompt.
- Press **9** for additional mailbox options.
- Press **5**, then follow the prompts.

NOTE You must have permission to use FindMe Forwarding.

Troubleshooting

If the number of messages in your mailbox exceeds the limit, the system notifies callers that your mailbox is full and unable to accept new messages. (Recently deleted messages remain in the mailbox and are included in the total count.)

If your mailbox is full, first purge any backlog of deleted messages.

To purge deleted messages

1 At the Main Menu prompt, press **7**.
2 Press **8** to remove deleted messages.
3 Press **1** to confirm deletion or * to cancel.

Leave Message

When dialing into a ShoreTel system, if the person you are trying to reach does not answer, your call will be sent to a mailbox and you will hear a standard greeting. You can select from the following options:

Bypass greeting
0 Transfer to assistant
1 Forward to recipient's FindMe destination
9 Transfer to Auto-Attendant

LEAVING A MESSAGE
(Voice mail options when in mailbox)

Message Recording

If you choose to leave a recorded message, the following options are available after recording your message:

Message options
* Re-record
0 Send message, transfer to assistant
1 Send message, forward to recipient's FindMe destination
9 Send message, transfer to Auto-Attendant

NOTE Hanging up sends the message.

Message Options

When leaving a message, select from the following options:

Send message
* Cancel
1 Review
2 Re-record
3 Mark/unmark urgent
0 Send message, transfer to assistant
9 Send message, transfer to Auto-Attendant

ShoreTel

ShoreTel Voice Mail Quick Reference

PRESS

Main Menu for Voice Mail Operations

1

Listen to Messages

Select one of the following options during or at the end of a message:

- **0** Additional options
- **1** Replay
- **2** Save
- **3** Delete
- **4** Forward
- **5** Reply
- **6** Play envelope
- **7** Move backward
- **8** Pause
- **9** Move forward
- **#** Skip
- ***** Cancel

5 Reply

Select one of the following :

- **1** Reply with a voice mail
- **2** Reply with a call back
- **3** Reply to all with a voice message

Log In: Internal

a) From your own extension, lift the headset, press #, enter password, and press #
b) From another extension, press # twice, enter extension, enter password, and press #

Log In: External

Call your voice mail access number, enter extension, enter password, and press #

2

Send a Message

Record your message at the tone. When finished, press # and select from the following options:

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

 # Accept

Enter the extension or the system distribution list to receive the message:

- **#** Conclude addressing
- **0** Additional addressing options
- ***** Cancel last address
- ****** Cancel

 # Conclude Addressing

- **#** Send
- **1** Mark/unmark urgent
- **2** Mark/unmark for return receipt
- **3** Enter additional addresses
- ***** Cancel

0 Addressing Options

- **1** Address by name
- **2** Address by personal distribution list
- **3** Broadcast

1 Address by Name

Spell the name of the person, last name first. Press 7 for Q and 9 for Z. ***** Cancel

Note: System returns to Addressing after name is entered.

2 Address by Personal Distribution List

Enter the two-digit personal distribution list number. ***** Cancel

3

Listen to Saved Messages

Refer to "Listen to Messages" for message options while listening to saved messages.

7

Change Mailbox Options

- **1** Record greeting
- **2** Set call handling mode
- **3** Re-assign extension
- **4** Set password
- **5** Enable/disable envelope information
- **6** Record name
- **7** Listen to deleted messages
- **8** Remove deleted messages
- **9** Additional options
- ***** Cancel

1 Record Greeting

Record your greeting for the currently active mode at the tone. When finished, press # and select from the following options:

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

2 Set Call Handling Mode

- **1** Standard
- **2** In a meeting
- **3** Out of office
- **4** Extended absence
- **5** Custom
- **6** No change
- ***** Cancel

3 Re-assign Extension

Press either **1** to Assign, or **2** to Un-assign.

4 Set Password

Enter password twice in response to the prompts.

* Cancel

5 Enable Envelope Info

Press either **1** to enable, or **2** to disable

6 Record Name

Record your name at the tone. When finished, press # and select from the following options:

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

8 Remove Deleted Messages

- **1** Confirm ***** Cancel

9 Additional Options

- **1** Enable or disable Outlook automated call handling
- **2** Change email delivery options
- **3** Change Agent state
- **5** Change Find Me Forwarding state
- ***** Cancel

2 Email Delivery Options

- **1** Disable email delivery
- **2** Enable email delivery
- **3** Enable email delivery with voice mail attached
- **8** Mark voice mail heard after email delivery

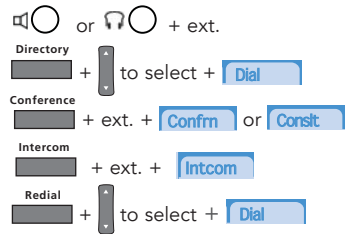**3 Agent State**

- **1** Log in and assign extension
- **2** Log out
- **3** Log in without assigning extension

8

Log Off

9

Return to Auto-Attendant

0

Transfer to Assistant

#

Hear Mailbox Status

ShoreTel

ShoreTel 230/230g IP Phone Quick Reference

PHONE OPERATION

Place Calls

Use the Speakerphone or a Headset 📢○ or 🎧○ + ext.

Use the Directory **Directory** [___] + [▲▼] to select + [Dial]

Make a Conference Call **Conference** [___] + ext. + [Confrn] or [Conslt]

Use the Intercom **Intercom** [___] + ext. + [Intcom]

Redial and Check Missed Calls **Redial** [___] + [▲▼] to select + [Dial]

Dial Paging Extension number provided by administrator

Answer Calls

Send a Call to Voice Mail lift handset or [Answer] or 📢○ or 🎧○

[To VM]

Divert a Call **Transfer** [___] + ext. + [Transf]

Select a Ring Tone **Options** [___] + password + [#] + [▲▼] to select

Adjust Handset, Headset,

or Speakerphone Volume [▲▼] to select

Answer Call Waiting select appropriate call key

Interact with Calls

Mute a Call 🔇○

Place a Call On or Off Hold **Hold** [___]

Transfer a Call **Transfer** [___] + ext. + [Transf] or [Conslt]

Join Calls [Join]

Park Calls [Answer] + [Park] + ext.

Unpark Calls lift handset or 📢○+ [UnPark] + ext. + [UnPark]

Change Call Handling Mode [Mode] + [▲▼] to select + [OK]

Log In and Out of Workgroups
Options [___] + password + [#] + [▲▼] to select

Adjust the Display Contrast
press and hold 🔇○ + [▲▼] to select

VOICE MAIL

Log Into the Main Menu
Voice Mail [___] + password + [#]

Log In from Another Extension
[#] [#] + ext. + password + [#]

Note: For more information about voice mail features, please consult the Voice Mail Quick Reference.

OFFICE ANYWHERE CODES

Transfer a call [*] [*] + destination + [#] [#]

Conference a call [*] [*] + destination + [*] [*]

Hold a call [*] [*]

Hang up [#] [#]

Access other star codes [*] [*] + (star code from below)
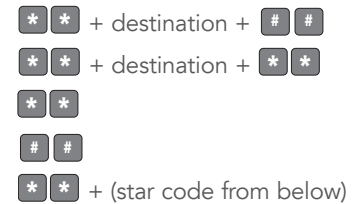
QUICK REFERENCE OF COMMON STAR CODES

Park a call [*] [1] [1] + ext.

UnPark a call [*] [1] [2] + ext.

Pick Up a Remote Extension [*] [1] [3] + ext.

Pick Up the Night Bell [*] [1] [4]

Use the Intercom [*] [1] [5] + ext.

Barge In [*] [1] [6] + ext.

Silent Monitor [*] [1] [7] + ext.

Toggle the Hunt Group Status [*] [1] [8] + HG ext.

Whisper Page [*] [1] [9] + ext.

Change CHM and Forwarding **Voice Mail** [___] + password + [#] + [7] [2]

Change Extension Assignment **Voice Mail** [___] + password + [#] + [7] [3] [1]

Unassign Extension Assignment **Voice Mail** [___] + password + [#] + [7] [3] [2]

Assign Extension to External Number **Voice Mail** [___] + password + [#] + [7] [3] [3]
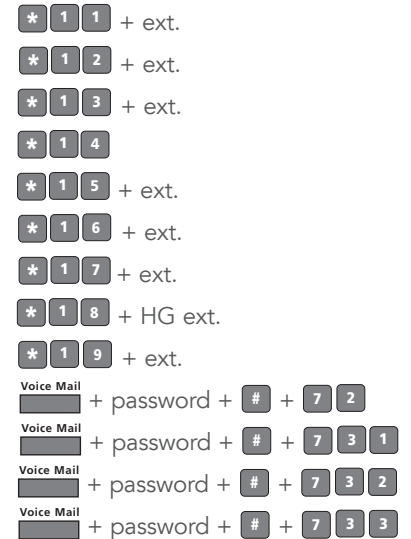
TROUBLESHOOTING

View Phone Information 🔇○ + I-N-F-O + [#]

Reboot Your Phone 🔇○ + R-E-S-E-T + [#]
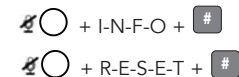
Note: For additional details on the information contained in this Quick Reference card, please consult the IP 230/230g User Guide.

ShoreTel, Inc., 960 Stewart Drive Sunnyvale, California 94085 USA Phone: +1.408.331.3300 +1.800.425.9385 Fax: +1.408.331.3333 www.shoretel.com

ShoreTel 230/230g IP Phone Quick Reference

Handset with Finger Rest

LCD Display
141 x 44 pixels, monochrome

Indicator LED
Flashing light alerts the user to incoming calls and unheard voice messages.

Speaker
Delivers high-quality wideband sound.

Scroll Button
Select options in interface.

Soft Keys
Context-sensitive, functions defined on display.

Three Custom Keys - indicators
Configurable as call keys, monitored extensions, speed dial keys, or programmed keys.
230: keys with green LED indicator.
230g: keys with tri-color LED indicator

Function Keys Overlay
Vinyl overlay imprinted with international symbols.

Dial Pad

Microphone

Headset jack

Audio Control Keys
Volume button controls handset, speaker, and ring volume. Mute, Speaker, and Headset keys illuminated when functions are active.

Function Keys
Perform core telephony functions (Voice Mail, Transfer, Options, Conference, Directory, Intercom, Redial, Hold)

Note: You can connect a supported headset into the 230/230g IP Phone by plugging the headset into the headset jack at the left corner of the phone chassis. Contact your system administrator for details.

GUIDE TO LEDS

ShoreTel 230/230g IP phones provide visual cues to display operational status
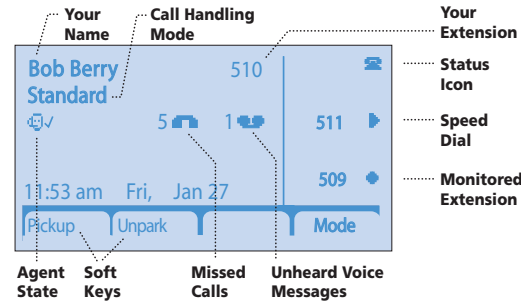
230 IP Phone Operational signals
- ● Steady Green - in use by you
- Blinking Green - (Fast) on hold or call parked
- Blinking Green - (Slow) incoming call
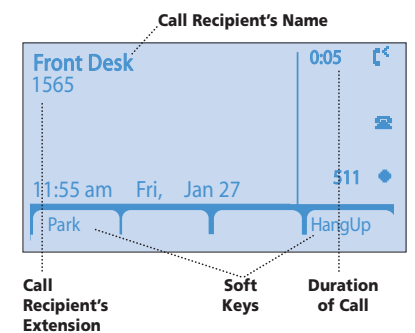
230g IP Phone Operational signals
- ● Steady Green - in use by you
- Blinking Green - (Slow blink: 1s on/1s off) incoming call
- Blinking Orange - (Fast blink: .25s on/.25s off) on hold or call parked
- ● Steady Orange - extension's call handling mode set to Do Not Disturb
- ● Steady Red - in use by other party (applies to BCA and Extension Monitor)

GUIDE TO STATUS ICONS

ShoreTel IP 230/230g Idle Interface

Your Name
Call Handling Mode
Your Extension
Status Icon
Speed Dial
Monitored Extension

Bob Berry
Standard   510   ☎
        5 🔃 1 👥   511 ▶
                      509 ◆
11:53 am   Fri, Jan 27
Pickup   Unpark   Mode

Agent State | Soft Keys | Missed Calls | Unheard Voice Messages

ShoreTel IP 230/230g Outbound Call

Call Recipient's Name

Front Desk   0:05 ☎
1565   ☎

11:55 am   Fri, Jan 27   511 ◆
Park   HangUp

Call Recipient's Extension | Soft Keys | Duration of Call

Main Display

- 👥 Unheard Voice Messages
- 👤 Missed Calls
- Logged Into Workgroup
- Logged Into Workgroup, In Wrap-Up
- Logged Out of Workgroup

Custom Keys - Call

- ☎ On Hook
- Off Hook
- Inactive / Do Not Disturb
- Incoming Call (Animated)
- On a Call
- On a Conference Call
- Call On Hold / Parked
- Remote Hold

Custom Keys - Monitored Extension

- Idle
- Inactive / Do Not Disturb
- Unheard Voice Messages
- Do Not Disturb / Unheard Messages
- Incoming Call (Animated)
- On a Call
- Incoming Call and On a Call
- On a Conference Call
- Call On Hold / Parked

Custom Keys - Speed Dial

- Speed Dial Extension

ShoreTel, Inc., 960 Stewart Drive   Sunnyvale, California 94085 USA Phone: +1.408.331.3300   +1.800.425.9385 Fax: +1.408.331.3333   www.shoretel.com

ShoreTel®