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.
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.
• 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 #. At the prompt, use the dial pad to enter your password. (If you have not been assigned a password, use the default password, 1234.)
2 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.
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.

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

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
Main Menu for Voice Mail Operations

<table>
<thead>
<tr>
<th>Press</th>
<th>Menu</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Listen to Messages</td>
<td>Select one of the following options during or at the end of a message: 0 Additional options 1 Play envelope 2 Move forward 3 Move backward 4 Forward 5 Reply 6 Pause 7 Skip 8 Move backward 9 Move forward</td>
</tr>
<tr>
<td>2</td>
<td>Send a Message</td>
<td>Record your message at the tone. When finished, press # and select from the following options: 0 Mark urgent 1 Mark urgent for return receipt 2 Mark urgent for return receipt 3 Enter additional addresses 4 Forward 5 Reply 6 Play envelope 7 Move backward 8 Pause 9 Move forward 10 Skip 11 Move backward 12 Move forward 13 Skip 14 Send 15 Addressing options 15.1 Address by name 15.2 Address by personal distribution list 15.3 Broadcast</td>
</tr>
<tr>
<td>3</td>
<td>Listen to Saved Messages</td>
<td>Refer to “Listen to Messages” for message options while listening to saved messages.</td>
</tr>
<tr>
<td>7</td>
<td>Change Mailbox Options</td>
<td>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</td>
</tr>
<tr>
<td>8</td>
<td>Log Off</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Return to Auto-Attendant</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>Transfer to Assistant</td>
<td></td>
</tr>
<tr>
<td>#</td>
<td>Hear Mailbox Status</td>
<td></td>
</tr>
</tbody>
</table>

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
4 Pause
5 Move forward
6 Skip
7 Move backward
8 Stop
9 Move forward
10 Skip
11 Move backward
12 Move forward
13 Skip
14 Send
15 Addressing options
15.1 Address by name
15.2 Address by personal distribution list
15.3 Broadcast

5.1 Record Greeting

Record your greeting for the currently active mode at the tone. When finished, press # and select from the following options:
1 Accept
2 Review
3 Re-record
4 Cancel

5.2 Set Call Handling Mode

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

6 Record Name

Record your name at the tone. When finished, press # and select from the following options:
1 Accept
2 Delete
3 Cancel

7 Record Extension

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

8 Enable Envelope Info

Press either 1 to enable, or 2 to disable

9 Additional Options

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

Email Delivery Options

1 Disable email delivery
2 Enable email delivery
3 Enable email delivery with voice mail attached
4 Mark voice mail heard after email delivery

Agent State

1 Log in and assign extension
2 Log out
3 Log in without assigning extension
ShoreTel 230/230g IP Phone Quick Reference

PHONE OPERATION

Place Calls
- Use the Speakerphone or a Headset
- Use the Directory
- Make a Conference Call
- Use the Intercom
- Redial and Check Missed Calls
- Dial Paging Extension

Answer Calls
- Send a Call to Voice Mail
- Divert a Call
- Select a Ring Tone
- Adjust Handset, Headset, or Speakerphone Volume
- Answer Call Waiting

Interact with Calls
- Mute a Call
- Place a Call On or Off Hold
- Transfer a Call
- Join Calls
- Park Calls
- Unpark Calls
- Change Call Handling Mode

Log In and Out of Workgroups

Adjust the Display Contrast

OFFICE ANYWHERE CODES

<table>
<thead>
<tr>
<th>Code</th>
<th>Action</th>
<th>Additional Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>#</td>
<td>Transfer a call</td>
<td>+ destination</td>
</tr>
<tr>
<td>#</td>
<td>Conference a call</td>
<td>+ destination</td>
</tr>
<tr>
<td>#</td>
<td>Hold a call</td>
<td>+ ext.</td>
</tr>
<tr>
<td>#</td>
<td>Hang up</td>
<td></td>
</tr>
<tr>
<td>#</td>
<td>Access other star codes</td>
<td>+ (star code from below)</td>
</tr>
</tbody>
</table>

QUICK REFERENCE OF COMMON STAR CODES

<table>
<thead>
<tr>
<th>Code</th>
<th>Action</th>
<th>Additional Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>#</td>
<td>Park a call</td>
<td>+ ext.</td>
</tr>
<tr>
<td>#</td>
<td>UnPark a call</td>
<td>+ ext.</td>
</tr>
<tr>
<td>#</td>
<td>Pick Up a Remote Extension</td>
<td>+ ext.</td>
</tr>
<tr>
<td>#</td>
<td>Pick Up the Night Bell</td>
<td>+ ext.</td>
</tr>
<tr>
<td>#</td>
<td>Use the Intercom</td>
<td>+ ext.</td>
</tr>
<tr>
<td>#</td>
<td>Barge In</td>
<td>+ ext.</td>
</tr>
<tr>
<td>#</td>
<td>Silent Monitor</td>
<td>+ ext.</td>
</tr>
<tr>
<td>#</td>
<td>Toggle the Hunt Group Status</td>
<td>+ HG ext.</td>
</tr>
<tr>
<td>#</td>
<td>Whisper Page</td>
<td>+ ext.</td>
</tr>
<tr>
<td>#</td>
<td>Change CHM and Forwarding</td>
<td>+ password + 7</td>
</tr>
<tr>
<td>#</td>
<td>Change Extension Assignment</td>
<td>+ password + 7</td>
</tr>
<tr>
<td>#</td>
<td>Unassign Extension Assignment</td>
<td>+ password + 7</td>
</tr>
<tr>
<td>#</td>
<td>Assign Extension to External Number</td>
<td>+ password + 7</td>
</tr>
</tbody>
</table>

TROUBLESHOOTING

<table>
<thead>
<tr>
<th>Code</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>#</td>
<td>View Phone Information</td>
</tr>
<tr>
<td>#</td>
<td>Reboot Your Phone</td>
</tr>
</tbody>
</table>

Note: For additional details on the information contained in this Quick Reference card, please consult the IP 230/230g User Guide.

VOICE MAIL

Log Into the Main Menu

Log In from Another Extension

Note: For more information about voice mail features, please consult the Voice Mail Quick Reference.
ShoreTel 230/230g IP Phone Quick Reference

GUIDE TO STATUS ICONS

ShoreTel IP 230/230g Idle Interface

ShoreTel IP 230/230g Outbound Call

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
- Blinks Green - (Fast) on hold or call parked
- Blinks Green - (Slow) incoming call

230g IP Phone Operational signals
- Steady Green - in use by you
- Blinks Green - (Slow blink: 1s on/1s off) incoming call
- Blinks 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)

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.