ShoreTel Connect Client
User Guide

November 20, 2015

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Preface

This preface provides information about the objectives, organization, and conventions used in the *User Guide.*

About this Guide

The User Guide includes the following sections.

Table 1: User Guide Contents

Chapter	Description
Preface	Describes the structure, notations and conventions used in the Guide.
Introduction	Provides an overview of the ShoreTel Connect client and lists the prerequisites for installing and using the client.
Installing and Launching the ShoreTel Connect client	Describes the procedures for installing and launching the ShoreTel Connect client.
Using the ShoreTel Connect client	Describes the process of signing in and navigating through the ShoreTel Connect client.
Managing Contacts	Describes procedures for managing contacts on the ShoreTel Connect client.
Managing Availability	Describes the availability icons and the process of changing the availability status on the ShoreTel Connect client.
Managing Phones	Describes the process of using a desk phone with the ShoreTel Connect client.
Managing Voice Calls	Describes procedures for handling calls, managing call options, routing calls and handling voicemail messages.
Managing Instant Messaging (IM)	Describes procedures for handling instant messaging on the ShoreTel Connect client.

Table 1: User Guide Contents

Chapter	Description
Integration with Microsoft Exchange	Describes the process of integrating the ShoreTel Connect client with Microsoft Exchange.
Managing Conferences	Describes procedures for creating, viewing, recording, and canceling conferences using the ShoreTel Connect client.
Sharing on the ShoreTel Connect client	Describes the process of sharing screens and files on the ShoreTel Connect client.
Managing Your Account	Describes procedures for managing your user account on the ShoreTel Connect client.
Managing Workgroups	Describes information about managing workgroups using ShoreTel Connect client

CHAPTER

1

Installing and Launching the ShoreTel Connect Client

This chapter provides information about configuring the ShoreTel Connect client and includes the following sections:

Overview

The ShoreTel Connect client presents a single interface to manage business communications using your ShoreTel desk phone, computer, mobile phone, or home telephone.

Using the ShoreTel Connect client simplifies your day-to-day communications, streamlines your work, and makes it easier to stay in the loop by putting intuitive communication and collaboration tools at your fingertips. The ShoreTel Connect client for Windows also integrates with Microsoft Outlook for events, voicemail, conference, and contacts. The ShoreTel Connect client for OS X integrates with Microsoft Outlook for events only.

The ShoreTel Connect client offers the following features:

- **Search Bar**: Find a contact instantly by entering their name, number, email address, or company name in the search bar.

- **Contact Card**: Initiate a call, IM contact, view known numbers and email of a contact, view and search IM conversation history, all calls and voicemails.

- **Contact Groups**: Create and organize your contacts into favorites and custom groups. You can initiate a group chat with an entire group, schedule a meeting with an entire group, or leave a voicemail for the group.

- **Availability State**: Find out if your contacts are available to talk or chat by checking their availability state. Your availability state reflects your state on the ShoreTel Connect client or is derived from your Microsoft Outlook schedule, whether you are in a meeting, out of office, or simply do not want to be disturbed.

- **Calling**: Call your contacts instantly through your desk phone, softphone, or externally assigned number.

- **Instant Messaging (IM)**: Chat instantly with one or more contacts.

- **Call Transfer**: You can transfer a call with the following options:

  - **Transfer**: Transfer an incoming call to a selected contact.

  - **Consult**: Connects to the recipient of the call transfer, then sends the call upon your signal. This allows you to introduce the call to the recipient before the call transfer.

  - **Park**: Parks a call places the call on hold at another extension.

  - **Intercom**: Transfers the call. Allows you to announce the incoming call over the deskphone intercom of the person the call is transferred.

  - **Whisper**: Allows to break into an active call, and communicate with one party without the other party hearing, before transferring the call.

  - **Voicemail**: Transfers the call to the recipient's voice mailbox.

- **Call Routing**: Set up call routing rules. You can setup rules to simultaneously ring other numbers besides your extension. Additionally, you can route calls based on the availability state and create rules based on time of day, caller ID and other factors.

- **Voicemail**: Leave a voicemail message for a contact who is unavailable to talk, or record a voicemail greeting message for contacts leaving a message in your voicemail inbox.

- **Conferencing and Collaboration**: Create a conference to communicate and collaborate with people in or out of your contact lists.

- **Conversation History**: Instantly check all call, voicemail, and IM history with a contact.

- **Sharing Screens**: Choose to share your screen with a contact any time.

- **Softphone**: Make phone calls over the Internet.

- **Outlook Integration**: Windows client integrates with Outlook to import contacts and synchronize calendar events.

- **Address Book Integration for OS X**: The ShoreTel Connect client for Macintosh integrates with and imports contacts from the Address Book application.

- **ShoreTel Conferencing for the Web:** You can launch ShoreTel conferencing without the ShoreTel Connect client. By using ShoreTel Conferencing for the Web, you can join a ShoreTel conference as a participant from any non-ShoreTel network.

This completes the introduction to the ShoreTel Connect client.

Installing the Connect Client on Windows OS

To install and launch the ShoreTel Connect client on Windows OS, follow the steps described in this section:

✎ Note

Before installing ShoreTel Connect client, you must manually uninstall any versions of ShoreTel Communicator that you have on your computer.

Administrative rights on the computer are required to install ShoreTel Connect client for Windows.

ShoreTel Connect client is also supported on Windows 10 OS.

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1. Open the e-mail notification from the ShoreTel administrator describing the instructions for installing the ShoreTel Connect client.

2. Click the link to initiate the ShoreTel client installation.

   The **ShoreTel Connect - InstallShield Wizard** dialog box is displayed.

   The executable file detects the OS and launches the appropriate installer for Windows OS. The InstallShield Wizard downloads and unpacks the installation files (showing the progress of the download), and launches the Windows Installer.

   The **Welcome to the InstallShield Wizard for ShoreTel Connect** screen is displayed.

3. To proceed with the installation, click **Next**.

   The **License Agreement** screen is displayed.

4. If you agree to the license terms, select **I accept the terms in the license agreement,** and click **Next**. Without selecting this option, you cannot proceed with the installation.

   The **Destination Folder** screen is displayed.

5. Do either of the following:

   ■ To install the ShoreTel Connect client to a different folder, click **Change** and select the folder.
   ■ To install the ShoreTel Connect client to the selected folder, click **Next**.

   The **Ready to Install the Program** screen is displayed.

6. Click **Install** to start the installation.

   The **Installing ShoreTel Connect** screen showing the installation progress is displayed.

   If the installation is successful, the **InstallShield Wizard Completed** screen is displayed.

7. Click **Finish**.

   The ShoreTel Connect client is listed as a program on the start menu of your Windows OS, and a shortcut is placed on the desktop.

8. Click the **ShoreTel Connect** icon on the start menu.

    The ShoreTel Connect client is successfully launched on your Windows OS.

Installing the Connect Client on OS X

To install and launch the ShoreTel Connect client on OS X, follow the steps described in this section:

> **Note**
> Before installing the Connect client, you must manually uninstall any versions of ShoreTel Communicator that you have on your computer.

1. Open the e-mail notification from the ShoreTel administrator describing the instructions for installing the ShoreTel Connect client.

2. Click the provided link to initiate the ShoreTel client installation.

   The installation file is downloaded to the default downloads folder on your computer.

3. Double-click the installation file.

   The **ShoreTel** screen is displayed.

4. Click **Finder > Applications**.

5. Drag the ShoreTel Connect client icon to the **Applications** folder and double-click the icon.

   The ShoreTel Connect client is successfully launched on OS X.

CHAPTER

2

Using the ShoreTel Connect Client

This chapter describes how to use the ShoreTel Connect client and includes the following sections:

Signing into the Connect Client

Before you can start using the Connect client, you must sign in.

You can sign into the ShoreTel Connect client in two ways:

- Signing in with Windows Credentials on page 14

- Signing in with ShoreTel User Credentials on page 14

Signing in with Windows Credentials

1. Double-click the ShoreTel Connect client icon to launch the client.

   The ShoreTel login screen is displayed. The login screen contains the following fields:

   - **Email or Username**

   - **Password**

   - **Domain**

   - **Server**

2. Click **+Show Advanced...** to see the **Domain** and **Server** fields.

3. Select the **Use Windows Credentials** checkbox.

   This will populate the domain and your Windows credentials.

   You can select the **Remember this and log me in automatically next time** checkbox if you want the client to remember your credentials on your next login.

4. Enter the fully qualified domain name (FQDN) in the **Server** field.

5. Click **Log In**.

   The ShoreTel Connect client is launched with your Windows credentials.

Signing in with ShoreTel User Credentials

1. Double-click the ShoreTel Connect client icon to launch the client.

   The ShoreTel login screen is displayed.

2. Type your email address or user name in the **Email or Username** field.

3. Type your password in the **Password** field.

   You can select the **Remember this and log me in automatically next time** checkbox if you want the client to remember your credentials on your next login.

4. Click **+Show Advanced...** to enter the fully qualified domain name (FQDN) in the **Server** field.

5. Click **Log In**.

   The ShoreTel Connect client is launched with your ShoreTel user credentials.

Navigating the Connect Client Interface

The ShoreTel Connect client interface consists of three main panes that are displayed when selecting certain menu items as illustrated in Figure 1.
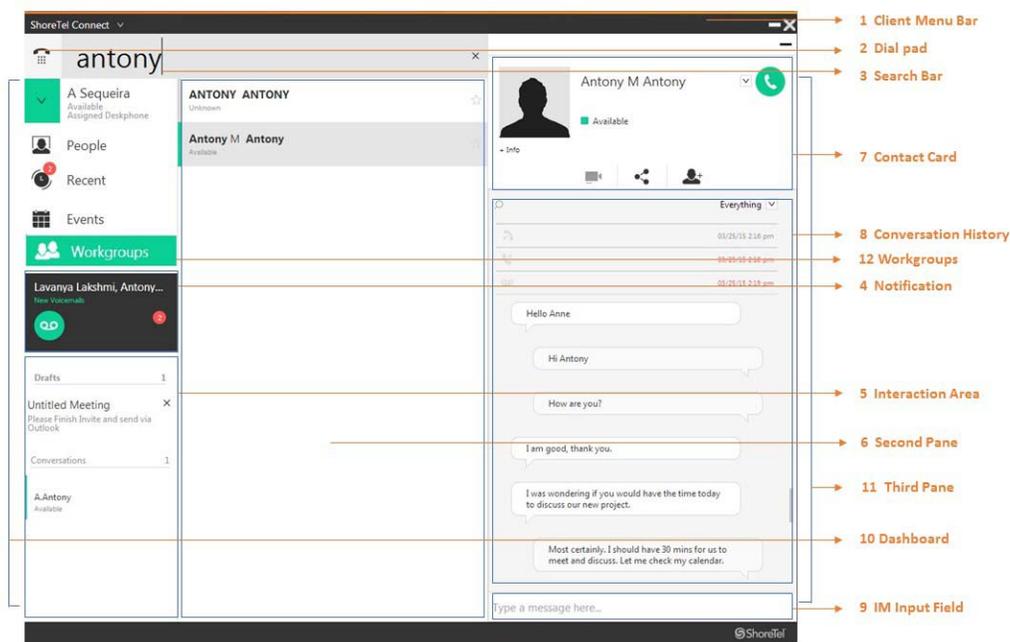
Figure 1: ShoreTel Connect client Interface

- **Client menu bar**[1]: The client menu bar is the top frame of the Connect client and can be used as shortcut to launch the Settings/Preferences screen, install any client related updates, check the version of the client, or to close the client. You can click the drop-down list to access these screens.

- **Dial pad**[2]: The dial pad is denoted by the telephone receiver icon at the top-left corner of the Connect client. You can use the dial pad to enter a number for dialing.

- **Search bar**[3]: The rectangular box next to the dial pad is the search bar. You can use this area to enter the name of a contact (as shown in Figure 1), number, an email address, or company name. The search results are displayed on the second pane.

■ **Dashboard**[10]: Dashboard is the default pane and main navigation interface that is displayed when the Connect client is launched. It consists of the Client menu bar, Dial pad, Search bar, Username tab, People tab, Recent tab, Events tab, Notification, and the Interaction area, as explained:

    ❏ **<username>**: This <username> tab provides quick access to your profile. Your username is displayed with your availability state (see Chapter 4, Managing Availability on page 29) and whether you are assigned a phone (see Chapter 5, Managing Phones on page 35).

    ❏ **People**: The People tab provides quick access to your contacts. When you click this tab, your contact list is displayed on the second pane. You can then choose to call or chat with the selected contact. See Chapter 3, Managing Contacts on page 19 for more information about this feature.

    ❏ **Recent**: The Recent tab is a record of all your past interactions with your contacts. This includes call history, voicemail history, chat history with all contacts.

    ❏ **Events**: The Events tab provides quick access to your past and upcoming calendar appointments. You will need to synchronize your Connect client with Microsoft Exchange if you want to view your Outlook appointments on this tab. Else, only the events that were created using the Connect client will appear here. For information on creating events, such as conferences, see Chapter 9, Managing Conferences on page 77. For information on integrating the Connect client with Microsoft Exchange/Outlook, see Chapter 8, Integration with Microsoft Exchange on page 73.

    ❏ **Notification**[4]: The notification area in the dashboard displays alerts about incoming calls, voicemail messages, events, or any error messages. The notification area can be easily distinguished because it appears with a black background.

    ❏ **Interaction area**[5]: The area below the notification area is the live interaction area where you can see the list of all conversations and drafts. You can open any of these interactions by clicking on the respective item.

    ❏ **Workgroups**[12]: The Workgroups tab can be seen on ShoreTel Connect client dashboard when agents and supervisors are members of a workgroup. You can see any active workgroup calls for a user and the current workgroup state of the user in the Workgroups tab. The user must be a member of a workgroup and must have a valid license type to view the information about workgroups in the dashboard.

■ **Second pane**[6]: The second pane is displayed when you click any of the tabs on the dashboard, when you click on a notification or conversation, or search for a contact through the search bar. This pane is designed to list more details about an item on the dashboard. For instance, on clicking the **People** tab on the dashboard, your list of directory contacts is displayed on the second pane.

■ **Third pane**[11]: The third pane is displayed when you click an item on the second pane, thus displaying more information about the selected item. As shown in Figure 1, when you click a contact on the second pane, the third pane displays the contact card, the conversation history, and the IM input field for interacting with the selected contact.

□   **Contact card**[7]: The contact card provides a quick method of communicating in various ways with the selected contact. You can tag a contact to be notified when the person is available for communication, dial the contact, or leave a message in their voicemail inbox.

□   **Conversation History**[8]: The conversation history is similar to the Recent tab, except that it displays all history for only a selected contact.

□   **IM Input Field**[9]: The IM input field is where you can type your instant messages to the selected contact.

Note

To close the second or third pane, click the minimize button at the top-right corner of the respective pane. To minimize the ShoreTel Connect client, click the minimize button at the top-right corner of the dashboard.

Alternately, to minimize the ShoreTel Connect client at once, click the minimize button on the client menu bar. To close the ShoreTel Connect client window, click the close button on the client menu bar.

To logout from the client completely, we recommend signing out, as described in Signing Out of the Connect Client on page 18.

Adding Shortcut Using Programmable Toolbar

You can use the Add Shortcut option from the ShoreTel Connect client to add shortcuts to the most used or preferred functions. These buttons function as shortcuts for operations that require more actions to accomplish the same task. You can use these shortcut buttons to perform a one-click operation for monitoring the call, starting a voice recording, opening up agent queue monitor, activating the softphone, or any other option.

To enable this feature, you must first configure the Client Toolbars programmable buttons in ShoreTel Connect Director for each user. For more information, see the Configuring Programmable IP Phone Buttons chapter in the *ShoreTel Connect System Administration Guide*.

The Add Shortcut interface consists of two panes as illustrated in Figure 2.
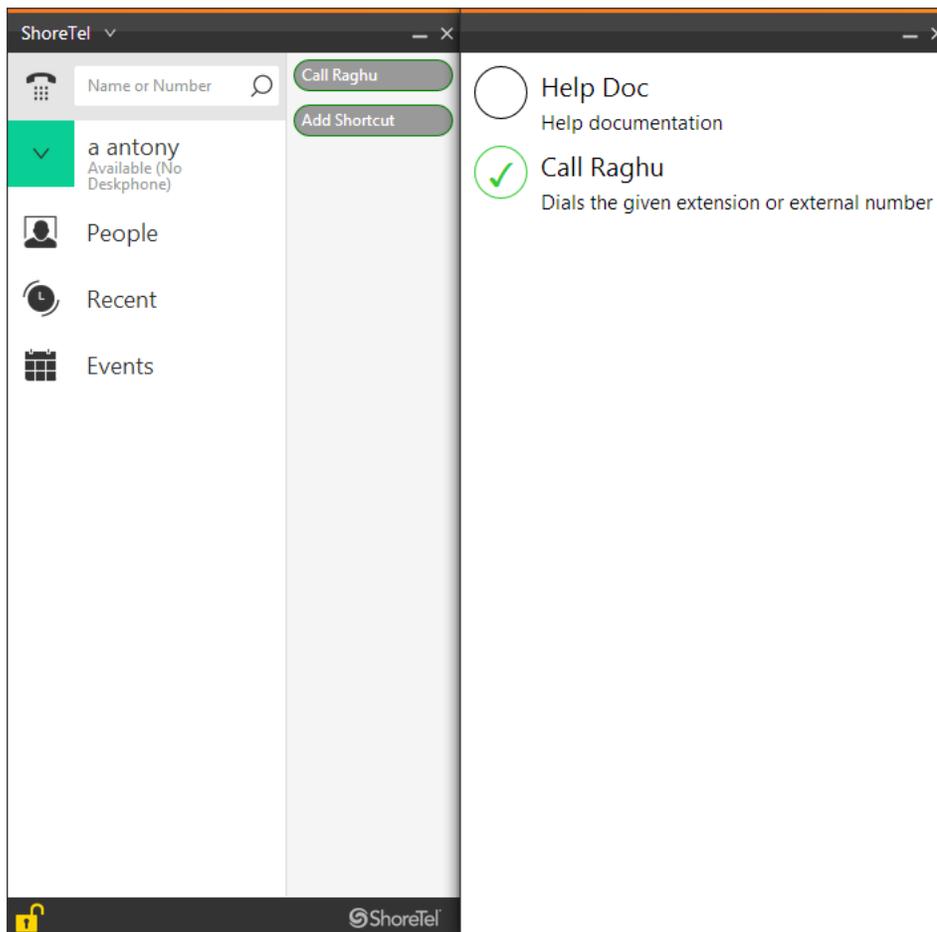
Figure 2: Add Shortcut interface

When you click on Add Shortcut option in ShoreTel Connect client, the list of functions that you had configured in ShoreTel Connect Director is displayed in a window as shown in Figure 2. Click each button to add the function to the Add Shortcut list. You can add a maximum of 10 functions to the list. Drag and drop to arrange the functions in order. Click the button again to remove the function from the list.

To hide the toolbar from ShoreTel Connect client, click ShoreTel in the menu bar and choose Show Toolbar.

Signing Out of the Connect Client

1. Click the **<username>** tab on the dashboard.

2. Click **Log Out** at the bottom of the second pane.

The ShoreTel Connect client login screen is displayed, which indicates that you have been successfully signed out of the client.

CHAPTER

3

Managing Contacts

This chapter provides information about how to manage your contacts in the ShoreTel Connect client, and includes the following sections:

Overview

The ShoreTel Connect client allows you to organize your contacts to make it faster and easier to find the contacts and information you want.

Finding a Contact

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. In the search bar, type either the first or last name, extension, IM address, company name, phone number, or the email address.

   Note

   Typing any letter in the search bar will fetch the search results in the alphabetical order.

   You can also search the contact by using the subset of the first and the last name. For example, typing jo mi in the search bar will result in John Miller.

   The search results are displayed on the second pane.

You have successfully located the required contact.

Adding a Contact

This section explains the procedures for adding a contact with and without Microsoft Exchange integration:

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Adding a Contact Using Outlook

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **People** tab.

   The people screen is displayed in the second pane.

3. Click **+New Contact** at the bottom left corner of the second pane.

   For Windows, an Untitled - Contact form is displayed in the outlook.

   For OS X, an address book contact form is displayed.

4. Fill in the contact details in the required fields.

5. For Windows, click **Save & Close** on the top left menu.

6. For OS X, click **Done**.

You have successfully added a contact.

Adding a Contact Without Using Outlook

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **People** tab.

   The people screen is displayed on the second pane.

3. Click **+New Contact** at the bottom left corner of the second pane.

   For Windows, a contact form is displayed on the third pane.

   For OS X, an address book contact form is displayed.

4. Fill in the contact details, and click **AddContact**.

   The new contact is saved.

5. To verify, check for the new contact in the search pad. For more information, see Finding a Contact on page 20.

The new contact is displayed in the second pane.

You have successfully added a new contact.

Adding a Contact from Recent

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **Recents** tab.

   The recents screen is displayed in the second pane.

3. Right-click on the new contact that you want to add, and click **Add As a Contact**.

4. For Windows, if outlook is integrated, then a new contact form is displayed in the outlook:

   ▪ Fill in the contact details, and click **Save and Close** available on the top left corner.

5. For OS X, if outlook is integrated, then a new address book contact form is displayed:

   ▪ Fill in the contact details, and click **Done**.

6. If outlook is not integrated, then:

   For Windows, a contact form is displayed on the third pane.

   For OS X, an address book contact form is displayed.

   a. Fill in the contact details, and click **AddContact**.

      The new contact is saved.

   b. To verify, check for the new contact in the search pad. For more information, see Finding a Contact on page 20.

You have successfully added a new contact.

Viewing a Contact Information

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **People** tab.

The people screen is displayed on the second pane.

3. Find the contact that you want to edit.

    For more information, see Finding a Contact.

    The new contact is displayed on the second pane.

4. Click the contact on the second pane.

    The contact details are displayed in the third pane.

5. Click **+ Info** below the profile picture.

    The contact details are displayed below the profile picture.

6. Click **- Hide Info** below the profile picture to hide the contact details.

To see the company name, department name, and phone number of a contact:

1. Right-click the contact on the second pane.

2. Select **Show Company Name**

3. Select **Show Department Name**

4. Select **Show Phone Number**

    The selected information is displayed on the second pane.

Deleting a Contact

1. Launch the ShoreTel Connect client.

    The dashboard is displayed.

2. Click the **People** tab.

    The people screen is displayed on the second pane.

3. Find the contact that you want to delete.

    For more information, see Finding a Contact on page 20.

    The new contact is displayed on the second pane.

4. Click the contact on the second pane.

    The contact details are displayed on the second pane.

5. Click **+ Info** below the profile picture.

    The contact details are displayed in the bottom of the third pane.

6. Click **Edit Contact**.

   The details of the contact is displayed.

7. Delete the contact details, as required, and then click **Delete Contact**.

   The contact is deleted.

You have successfully deleted the contact.

Creating a Contact Group

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **People** tab.

3. On the **Groups** tab**,** click **+New Group** at the bottom left corner of the second pane.

   The new group screen is displayed on the third pane.

4. In the Name field, type a group name.

5. In the People field, do any of the following:

   a. Type the contact name.

   b. Drag and drop the contacts from the Contacts list.

      To drag and drop the contacts from the second pane, click the **People** tab.

6. Click **Save Changes** to save a group.

You have successfully added a new contact group.

Instant Messaging with a Contact Group

You can use the instant messaging with a contact group feature to send instant messages, voicemails, and schedule meetings with the members of a contact group.

To send instant messaging with a contact group:

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **People** tab.

3. On the **Groups** tab**,** select a group.

   The selected group is displayed on the third pane.

4. Click **Start Group Chat**.

5. In the IM input field, type in the message and press **Enter**.

    You have successfully sent a message to a group.

Note

You can send instant messages to an individual member of a group by selecting a particular member from the selected group.

Editing a Contact Group

To add a new member or remove a member from the group:

1. Launch the ShoreTel Connect client.

    The dashboard is displayed.

2. Click the **People** tab.

3. On the **Groups** tab**,** select a group.

    The selected group is displayed on the third pane.

4. Click **Edit Group**.

    The contact details are displayed for editing.

5. Edit the contact details, as required, and then click **Save Changes**.

    The changes are saved to the contact.

    You have successfully edited the contact.

Scheduling Meeting with a Contact Group

To schedule a meeting with a group:

1. Launch the ShoreTel Connect client.

    The dashboard is displayed.

2. Click the **People** tab.

3. On the **Groups** tab**,** select a group.

    The selected group is displayed on the third pane.

4. Click **Schedule Meeting with Group**.

    The event creation page is displayed on the third pane.

    For more information, see Creating a Conference

Sending a Group Voicemail

To send a group voicemail:

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **People** tab.

3. On the **Groups** tab **,** select a group.

   The selected group is displayed on the third pane.

4. Click **Send Group Voicemail**.

   The group voicemail recording page is displayed on the third pane.

5. Select any of the following icons:

   - Phone icon to record the message through telephone device.

   - Speaker icon, to record the message through computer speaker.

6. Click the red record icon to record your message.

7. Click the gray stop icon to stop your recording.

8. Click the gray play icon to play your recorded message.

9. Enter the **Subject** fields as required.

10. Specify the voicemail response as Urgent, Private, or Receipt, as required.

    - Urgent—recipient can see an exclamation (!) mark next to the voicemail.

    - Private—recipient cannot forward a private voicemail.

    - Receipt—sends an acknowledgment to the sender that the recipient has listened to the voicemail.

11. Click **Send**.

You have successfully sent a group voicemail message.

Managing Contacts

This section provides procedures to manage your contacts.

Managing Favorite Contacts

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **People** tab.

   The people screen is displayed on the second pane.

3. To mark a contact as favorite, locate the contact, and click the favorite icon that appears as a star.

   For more information, see Finding a Contact on page 20.

4. To filter the favorite contact list, do the following:

   a. Click the **People** tab.

      The people screen is displayed on the second pane.

   b. On the top-right corner, click on the drop-down list and select **Favorites**.

   The favorite contact list is displayed on the second pane.

   c. You have successfully managed to mark and to filter the favorite contacts.

If import options are not available on the ShoreTel Connect client, contact system administrator.

CHAPTER

4

Managing Availability

This chapter provides information about understanding and managing availability states for you and your contacts on the ShoreTel Connect client, and includes the following sections:

Understanding Availability States

You can identify the availability of a contact on the ShoreTel Connect client before placing a call, or communicating with the contact in any way. Using availability increases your productivity by reducing attempts to connect with unavailable parties, and blocks unwanted attempts to engage in IM.

The ShoreTel Connect client automatically adjusts the availability status of users as they make and receive calls. Because of the integration with Microsoft Exchange, all meeting attendees will have an appropriate status on the ShoreTel Connect client, indicating that they are not available for an interaction.

You can monitor the availability of up to 500 contacts, and this can be configured by the system administrator. For more information, see the *ShoreTel Connect System Administration Guide*.

The different availability states are shown in Figure 3, and described in Table 2.
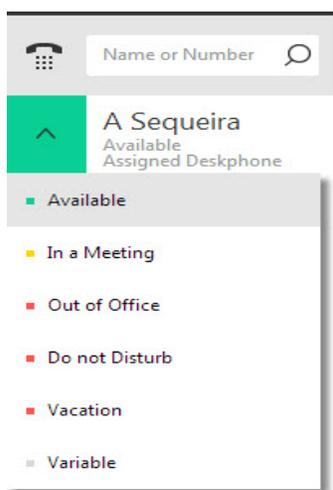
Figure 3: Availability States

Table 2: Availability State Descriptions

Color	State	Predefined/Customizable	Description
Green	Available	Predefined	The contact is available for a call or IM session.
Yellow	In a Meeting	Predefined	The contact is in a meeting, but you can still reach the contact through an IM session. If you dial this contact, the call will be routed by default to the contact's voicemail inbox or to the number configured using the availability routing as explained in Routing Calls on page 57.

Table 2: Availability State Descriptions(Continued)

Color	State	Predefined/ Customizable	Description
Red	Out of Office	Predefined	The contact is out of office and can be reached only through an IM. If you dial this contact, the call will be routed by default to the contact's voicemail inbox or to the number configured using the availability routing as explained in Routing Calls on page 57.
Red	Do not Disturb	Predefined	The contact is busy and does not wish to be reached. However, you can reach this contact through an IM.If you dial this contact, the call will be routed by default to the contact's voicemail inbox or to the number configured using the availability routing as explained in Routing Calls on page 57.
Red	Vacation	Predefined	The contact is on vacation, but can be reached through an IM. If you dial this contact, the call will be routed by default to the contact's voicemail inbox or to the number configured using the availability routing as explained in Routing Calls on page 57.
Gray	Custom	Customizable	The contact has a custom status, depending on the configured option. You can reach the contact through an IM. If you dial this contact, the call will be routed by default to the contact's voicemail inbox or to the number configured using the availability routing as explained in Routing Calls on page 57. The steps to set a custom status message are explained in Changing Availability State.

Changing Availability State

The ShoreTel Connect client automatically adjusts your availability state when you use the system. You can configure your availability state as explained in the following procedures.

- Selecting a Predefined Availability State on page 32

- Configuring a Custom Availability State and Status on page 32

Selecting a Predefined Availability State

1. From the dashboard, click the drop-down menu to the left of the **<username>** tab.

   The list of various availability states, as described in Table 2, is displayed. You can select any of the following states:

2. Click any of the following availability states you want to enable.

   - **Available**
   - **In a Meeting**
   - **Out of Office**
   - **Do not Disturb**
   - **Vacation**

   The selected availability state is displayed on the **<username>** tab.

Configuring a Custom Availability State and Status

1. From the dashboard, click the drop-down menu to the left of the **<username>** tab.

   The list of various availability states, as described in Table 2, is displayed.

2. Click the **Custom** availability state.

   The list of custom availability states is displayed as follows:

   - **<Available>** (Green)
   - **<Busy>** (Yellow)
   - **<Not Available>** (Red)

3. Click the state you want to customize.

   > **Note**
   >
   > The color of the availability state cannot be customized.

4. Enter your custom status in the **Type a status** field, and press **Enter**.

   The custom availability status and color is displayed on the **<username>** tab.

Note

To view your availability state in Microsoft Outlook after integration with the ShoreTel Connect client, ensure that you launch the client before launching Outlook on Windows.

Managing Availability States

You can configure a contact to manage your availability state on the ShoreTel Connect client, by following these steps:

1. On the dashboard, click the **<username>** tab.

   The second pane is displayed.

2. Click **Preferences**.

   The Preferences screen is displayed.

3. Click **Account > Access**.

   The Access screen is displayed.

4. Type in the contact name for whom you want to provide access.

   The contact name is auto-completed from the directory.

5. Click the auto-completed contact, and close the screen.

The contact is configured to change your availability state, until you revoke access by clearing the contact from the Access screen.

Note

There are two conditions for the contact you want to configure with this privilege:

1. The contact must have added you into a contact group.

2. The contact must have a Workgroup Supervisor or Operator license type and configured a specific class of service in ShoreTel Connect Director.

CHAPTER

5

Managing Phones

This chapter provides information about managing phones and includes the following sections:

Managing Desk Phone

This section provides information about assigning a desk phone to your ShoreTel Connect client.

Assigning Desk Phone

1. On the desk phone, press the **Assign** button.

   The Assign user screen is displayed.

2. In the **Extension** field, enter your assigned extension number, and press **Next** or the down key.

3. In the **Voicemail password** field, enter your voicemail password, and press **OK** or the **#** key.

   The extension is displayed on the top right corner of the desk phone.

4. **V**erify the desk phone status.

   a. Launch the ShoreTel Connect client.

   b. Verify the status on the dashboard:

      - If the **<username>** tab displays the status as **Assigned Deskphone,** then the desk phone is successfully assigned.

      - If the **<username>** tab displays the status as **No Deskphone**, then repeat from steps 1 - 4.

   c. Verify the desk phone status on the second pane:

      - Click the **<username>** tab to display the second pane.

      - Click the **Primary Assignment** tab, and verify that the **deskphone** option is displayed.

   You have successfully assigned your desk phone to the ShoreTel Connect client.

Customizing your Desk Phone

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **<username>** tab.

   Your username information is displayed on the second pane.

3. Click **Preferences**.

   The Preferences screen is displayed.

4. Click the **Deskphone** tab to display the desk phone options.

5. To set the language display on your deskphone, do the following:

   ▪ In the **Language: desk phone & voicemail menu** field, click the drop-down list and select the preferred language you want to change to.

      The desk phone starts rebooting and the change is displayed on the desk phone screen.

6. To set a wallpaper in the supported deskphone, do the following:

   ▪ In the **Wallpaper** field, click the drop-down list and select the preferred wallpaper from the list.

7. To set a Ringtone in the supported deskphone, do the following:

   ▪ In the **Ringtone** field, click the drop-down list and select the preferred ringtone from the list.

8. After the required changes are made, then click the close button on the top-right corner.

   The appropriate changes are displayed on the desk phone screen.

You have successfully customized your desk phone.

Removing the desk phone assignment

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **<username>** tab.

   Your username information is displayed on the second pane.

3. Click the **Primary Assignment** tab.

   The deskphone option is displayed as selected.

4. To reset the current extension assignment, click **Go Back To My Desk Phone**.

   The deskphone option disappears from the Primary Assignment tab. Also, the corresponding extension number disappears from the desk phone.

You have successfully removed your desk phone assignment.

Managing Softphone

This section provides information about how to manage your softphone.

By assigning your extension to the softphone, all your incoming calls are channeled only to the ShoreTel Connect client. The desk phone functionality is suppressed till you assign your desk phone again to the ShoreTel Connect client.

Assigning Softphone

1. Launch the ShoreTel Connect client.

    The dashboard is displayed.

2. Click the **<username>** tab.

    The username page is displayed on the second pane.

3. Click the **Primary Assignment** tab, and select **Softphone**.

    If the Softphone option in the Primary Assignment tab is not displayed, contact system administrator.

4. Select either the **default** or **Microphone Array.**

5. Verify the status from the dashboard:

    ■   If the **<username>** tab displays the status as **Softphone**, then the softphone is successfully assigned. Otherwise, repeat steps 1 to 5.

The softphone is successfully assigned.

Customizing the Softphone

1. Launch the ShoreTel Connect client.

    The dashboard is displayed.

2. Click the **<username>** tab.

    The username page is displayed on the second pane.

3. Click **Preferences**.

    The Preferences screen is displayed.

4. Click the **Softphone** tab to display the softphone options.

> **Note**
>
> If you do not see the Softphone tab, contact system administrator.

5. To switch to a different audio device, do the following:

    ■   In the **Capture audio through** field, click the drop-down list and select the preferred audio device.

6. If required, plug your audio device into the computer's headset port or use the computer's built-in speakers.

The softphone audio device is successfully customized.

Managing External Phones

This section provides information about how to assign an external phone number.

Assigning External Phones

1. Launch the ShoreTel Connect client.

    The dashboard is displayed.

2. Click the **<username>** tab.

    Your username information is displayed on the second pane.

3. Click the **Primary Assignment** tab.

4. Click the **Select Number** drop-down list.

    The Select Number screen is displayed.

    If you do not view this Select Number option, contact system administrator.

5. Type a name in the **Label** field. For example, Home or Mobile.

6. Enter the associated phone number in the **Number** field. You cannot use a phone number that is assigned to ShoreTel Connect for iOS or Android.

7. To choose a method to connect to the external number, click the drop-down list and select any of the following:

    ■   Automatically connect

    ■   Press 1 to connect

8. In the **rings to try** field, increment or decrement to select a number.

    This number determines the number of rings to the external phone number before forwarding the call to your voicemail.

9. Select a number that you have defined as an external number.

10. Click **Use Selected Number** to save the number.

    The external phone is selected.

You have successfully assigned an external phone under Primary Assignment tab.

CHAPTER

6

Managing Voice Calls

This chapter provides information about managing voice calls by using ShoreTel Connect client and includes the following sections:

Making a Call

This section explains the procedures for making a call.

- Making a Call from the Search Bar on page 43

- Making a Call from the Directory on page 44

Making a Call from the Search Bar

1. Launch the ShoreTel Connect client.

    The dashboard is displayed.

2. Type the contact details on the search bar.

    The rectangular area next to the dial pad and below the menu bar is the search bar. You can use this area to enter the first or last name, extension, IM address, company name, phone number, or an email address.

    For more information, see Finding a Contact on page 22.

> **Note**
> When you double-click a contact, a call is placed.

3. Click the contact.

    The contact details are displayed on the third pane.

4. Click the green call icon or double-click the contact.

    The call is successfully placed.

> **Note**
> When you are on a call, you can put the caller on hold and resume as required. Move the cursor on the call notification area to view the hold and resume icons. These options are also available on the contact card:
>
> - To hold the call, click the black pause icon, and the caller is put on hold.
>
> - To resume the call, click the green call icon, the caller is resumed to the original call.

The call is successfully placed from the search bar.

Making a Call from the Dialpad

1. Launch the ShoreTel Connect client.

    The dashboard is displayed.

2. Click the dialpad icon.

The dialpad is displayed.

3. Dial the extension or the mobile number, and press enter.

The call is placed from the dialpad.

Making a Call from the Directory

1. Launch the ShoreTel Connect client.

The dashboard is displayed.

2. Click the **People** tab.

The directory is displayed on the second pane.

3. Scroll down to find the contact.

> **Note**
>
> When you double-click a contact, a call is placed.

4. Click the contact.

The contact details are displayed on the third pane.

5. Click the green call icon.

The call is placed from your extension.

> **Note**
>
> When you are on a call, you can put the caller on hold and resume as required. Move the cursor on the call notification area to view the hold and resume icons. These options are also available on the contact card.
>
> - To hold the call, click the black pause icon, and the caller is put on hold.
>
> - To resume the call, click the green call icon, the caller is resumed to the original call.

You have successfully placed the call from the directory.

Answering a Call

1. Launch the ShoreTel Connect client.

The dashboard is displayed with an incoming call.

Note

A system notification with the caller name or the caller number is also displayed for an incoming call.

2. Click the green call icon on the left.

You have successfully answered a call.

To end the call, click the red call-end icon either from the dashboard or from the contact card.

Note

When the call is in progress, you can put the caller on hold and resume as required. Move the cursor on the call notification area to view the hold and resume icons. These options are also available on the contact card.

- To hold the call, click the black pause icon, and the caller is put on hold.

- To resume the call, click the green call icon, the caller is resumed to the original call.

Answering a Call Through an IM Conversation

1. Launch the ShoreTel Connect client.

The dashboard is displayed.

Any incoming call is displayed on the notification area of the dashboard.

Note

A system notification with the caller name or the caller number is also displayed for an incoming call.

2. View the incoming call in the notification area.

3. Click the drop-down list on the extreme left.

The IM screen is displayed on the second pane.

4. On the dashboard, type in a message or select a canned message, and click **Send**.

You have successfully answered a call through IM.

Transferring a Call

The ShoreTel Connect client allows you to do a blind transfer or a consult transfer. Prior to doing a consult transfer, you can either whisper or intercom the contact receiving the transfer. The call transfer dialog options are as follows:

- Transfer
- Consult
- Park
- Intercom
- Whisper
- Voicemail

Transferring a Call—Blind Transfer

You must have logged in to the ShoreTel Connect client to transfer an incoming call from the client.

1. View the incoming call in the notification area.

Note
A system notification with the caller name is also displayed for an incoming call.

2. To transfer an incoming call, click the green call transfer icon on the right.

    The contact screen is displayed with the call dialog options.

3. In the search field, type in the contact name or the phone number to transfer the incoming call, and press the **Enter** key.

    The call is blindly transferred to the recipient.

Transferring a Call using Call Dialog Menu

Transferring a Call using Transfer Option

1. View the incoming call in the notification area.

Note
A system notification with the caller name is also displayed for an incoming call.

2. Click the green icon to answer the call.

    The contact card of the incoming call is displayed in the second pane.

3. Click the call transfer icon.

The search field is displayed.

4. Type in a name or number.

The call dialog menu is displayed

5. Click **Transfer**.

You have successfully transferred the incoming call to the specified contact.

Transferring a Call using Consult Option

1. View the incoming call in the notification area.

2. Click the green icon to answer the call.

The contact card of the incoming call is displayed in the second pane.

3. Click the call transfer icon.

The search field is displayed.

4. Type in the name or number.

The call dialog menu is displayed

5. Click **Consult**.

The call is placed to the recipient.

You have successfully transferred the call with a consult.

Parking a call

1. View the incoming call in the notification area.

2. Click the green icon to answer the call.

The contact card of the incoming call is displayed in the second pane.

3. Click the call transfer icon.

The search field is displayed.

4. Type in the name or number.

The call dialog menu is displayed

5. Click **Park**.

The call is parked on the specified recipient.

You have successfully parked the incoming call at the recipient extension. If the call is not picked at the specified extension, the call is returned to you.

Transferring a Call using Intercom Option

1. View the incoming call in the notification area.

2. Click the green icon to answer the call.

    The contact card of the incoming call is displayed in the second pane.

3. Click the call transfer icon.

    The search field is displayed.

4. Type in the name or number of multiple recipients.

    The call dialog menu is displayed

5. Click **Intercom**.

    The call is transferred to multiple recipients as a single call.

Transferring a Call using Whisper Option

1. View the incoming call in the notification area.

2. Click the green icon to answer the call.

    The contact card of the incoming call is displayed in the second pane.

3. Click the call transfer icon.

    The search field is displayed.

4. Type in the name or number of multiple recipients.

    The call dialog menu is displayed

5. Click **Whisper**.

    You can successfully whisper to the recipient before the transfer.

Transferring a Call to the Voicemail Option

1. View the incoming call in the notification area.

2. Click the green icon to answer the call.

    The contact card of the incoming call is displayed in the second pane.

3. Click the call transfer icon.

    The search field is displayed.

4. Type in the name or number of multiple recipients.

    The call dialog menu is displayed

5. Click **Voicemail**.

    You can successfully leave a voicemail to the recipient.

Viewing Call History

You can view the call history either for all the contacts at once or only for a specific contact, as follows:

■   Viewing Call History for All Contacts on page 49

■   Viewing Call History for a Contact on page 49

Viewing Call History for All Contacts

1. Launch the ShoreTel Connect client.

    The dashboard is displayed.

2. Click the **Recent** tab.

    The list of all the interactions are displayed on the second pane.

3. Click the drop-down list on the top-left, and select **Calls**.

    The list of calls (received, dialed, and missed) is displayed.

You have successfully viewed the call history for all contacts.

Viewing Call History for a Contact

1. Launch the ShoreTel Connect client.

    The dashboard is displayed.

2. Find a contact.

    For more information, see Finding a Contact on page 22.

    The third pane is displayed with the details of the contact.

3. From the history board, click the drop-down list on the top-right corner, and select **Calls**.

    The list of calls (received, dialed, and missed) is displayed.

You have successfully viewed the call history for a contact.

Managing Voicemail

If the person being called is not available, the caller can leave a voicemail message. The voicemail messages are delivered to the assigned desk phone, ShoreTel Connect client, and also can be delivered to your email inbox.

This section explains procedures for managing your voicemail messages, as follows:

- Forwarding Calls to your Voicemail Inbox on page 50

- Leaving a Voicemail Message on page 51

- Accessing the Received Voicemail Messages on page 51

- Listening to a New Voicemail on page 52

- Flagging a Voicemail on page 52

- Replying to Received Voicemail on page 53

- Forwarding a Received Voicemail on page 53

- Deleting a Received Voicemail on page 54

- Restoring a Deleted Voicemail on page 54

- Configuring Email Notification for a Voicemail on page 55

- Setting Popup Notification for a Voicemail on page 55

- Changing your Voicemail Password on page 56

Note

For an incoming voicemail message you can set an email notification or a system popup notification. For more information, see the following:

- For setting the voicemail to receive as an email notification, see Configuring Email Notification for a Voicemail on page 55.
- For setting the voicemail to pop up as a system notification, see Setting Popup Notification for a Voicemail on page 55.

Forwarding Calls to your Voicemail Inbox

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

   You should have an active incoming call to forward to your voicemail. The incoming call is displayed in the Notification area.

> **Note**
>
> A system notification with the caller name or the caller number is also displayed for an incoming call.

2. Click the red voicemail icon in the middle.

   The caller is directed to record his voice message accordingly, as guided by the interactive voice response.

   You have successfully forwarded the incoming calls to your voicemail inbox.

   When the caller leaves a voicemail message, you will receive a voicemail notification on the dashboard.

Leaving a Voicemail Message

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Dial the contact.

   For more information, see

   The call is placed, and you have to wait till you are prompted to leave a voicemail message.

3. Follow the instructions from the interactive voice response to record your voice message.

   You have successfully left a voicemail message.

Accessing the Received Voicemail Messages

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **Recent** tab.

   The list of all the interactions are displayed on the second pane.

3. Click the drop-down list on the top-left corner and select **Voicemails**.

   All the voicemail messages are displayed on the second pane.

4. To further access the voicemail messages for a specific category, do the following:

   ■   To view all of the voicemail messages, click the **All** tab.

       All the voicemail messages (heard and unheard) are displayed.

   ■   To view only the missed voicemail messages, click the **Missed** tab.

The missed voicemail messages are displayed.

- To view the flagged voicemail messages, click the **Flagged** tab.

  The flagged voicemail messages are displayed.

- To view the deleted voicemail messages, click the **Deleted** tab.

  The deleted voicemail messages are displayed.

You have successfully accessed the voicemail messages.

You can choose to reply, forward, or delete the received voicemail.

Listening to a New Voicemail

1. Launch the ShoreTel Connect client.

   The dashboard is displayed with a new voicemail.

2. Click the green voicemail icon on the left.

   The voicemail is displayed on the second pane under Missed tab.

3. Choose either the phone or speaker icon, and then click the play icon.

   The voicemail message is played.

   From the second pane, you can choose to reply, forward, or delete the message by clicking the respective option.

You have successfully listened to the voicemail.

If you close the voicemail notification accidentally, you can retrieve the same by clicking the **Recent** > **All** tab. Alternately, you can filter for Voicemails to display only the voicemail messages.

Flagging a Voicemail

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **Recent** tab.

   The Recent screen is displayed.

3. Click the **All** tab.

   The list of all the interactions are displayed.

4. Right-click the voicemail you want to flag, and select **Flag Voicemail**.

   The flag icon appears on the voicemail message.

You have successfully flagged the voicemail message.

Replying to Received Voicemail

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Access the voicemail to reply.

   For more information, see Accessing the Received Voicemail Messages on page 51.

3. Click the required voicemail.

   The Reply, Forward, and Delete icons are displayed.

4. Click **Reply.**

   The reply inline screen is displayed.

5. Select any of the following icons:

   - Phone icon, to record the message through telephone device.

   - Speaker icon, to record the message through computer speaker.

6. Click the red record icon to record your message.

7. Click the grey stop icon to stop your recording.

8. Click the grey play icon to play your recorded message.

9. Edit the **To** and **Subject** fields as required.

10. Specify the voicemail response as Urgent, Private, Receipt, or Include Original, as required.

11. Click **Send**.

You have successfully replied to the voicemail message.

Forwarding a Received Voicemail

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Access the voicemail to forward.

   For more information, see Accessing the Received Voicemail Messages on page 51.

3. Click the specific voicemail.

   The Reply, Forward, and Delete icons are displayed.

4. Click **Forward.**

   The forward inline screen is displayed.

5. Select any of the following icons:

   ■ Phone icon, to record the message through telephone device.

   ■ Speaker icon, to record the message through computer speaker.

6. Click the red record icon to record your message.

7. Click the grey stop icon to stop your recording.

8. Click the grey play icon to play your recorded message.

9. Edit the **To** and **Subject** fields as required.

10. Specify the voicemail response as Urgent, Private, Receipt, as required.

11. Click **Send**.

   You have successfully forwarded the voicemail message to the recipient(s).

Deleting a Received Voicemail

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Access the voicemail to forward.

   For more information, see Accessing the Received Voicemail Messages on page 51.

3. Click the specific voicemail to delete.

   The Reply, Forward, and Delete icons are displayed.

4. Click **Delete.**

   You have successfully deleted the voicemail message.

   The deleted voicemail is listed on the Deleted tab.

Restoring a Deleted Voicemail

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **Recent** tab.

   The recent screen is displayed.

3. Click the drop-down list on the top-right corner, and select **Voicemails**.

   The voicemails are displayed on the second pane.

4. Click the **Deleted** tab.

   The deleted voicemails are listed on the second pane.

5. Locate the voicemail that you want to restore.

6. Click **Restore**.

The restored voicemail is listed on the All tab.

Configuring Email Notification for a Voicemail

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **<username>** tab.

   Your profile information is displayed on the second pane.

3. Click **Preferences > Notifications > Voicemail.**

   The voicemail screen is displayed.

4. Check **Send email notification about incoming voicemail to**, and type in the email address.

   The voicemail is configured for an email notification.

5. Do the following to further customize the voice email notification:

   ■ To receive the voicemail as a wave file format, check **Attach voicemail as a wave file**.

   ■ To mark the voicemail as read in the inbox, check **Mark voicemail as heard**.

You have successfully configured to receive a voicemail message as an email notification.

Setting Popup Notification for a Voicemail

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **<username>** tab.

   Your profile information is displayed on the second pane.

3. Click **Preferences > Notifications > Popup.**

   The popup screen is displayed.

4. To get a system notification for an incoming voicemail, do the following:

   - For Windows OS, check **Show a system notification for a voicemail**.

   - For OS X, do the following:

     1. Under **Incoming Voicemail**, click **Configure via OS X Notification Center...**

        The Notifications screen is displayed.

     2. In the Notification Center box, scroll down to click the ShoreTel Connect client icon.

        The ShoreTel Connect client alert style: screen is displayed.

     3. Click any of the following:

        - None

        - Banners

        - Alerts

        You have selected a mode to display the popup notification.

   You have successfully set your incoming voicemail message to appear as a system popup notification.

Changing your Voicemail Password

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **<username>** tab.

   Your profile information is displayed on the second pane.

3. Click **Preferences > Voicemail > Setup.**

   The Setup screen is displayed.

4. Under Change Voicemail Password screen, enter the following fields:

   - **Current**: Type in your current voicemail password.

   - **New**: Type in your new voicemail password.

   - **Retype to confirm**: Retype to enter your voicemail password.

5. Click **Set New Password**.

You have successfully changed your voicemail password.

Routing Calls

The incoming calls can be routed to the predefined external phones by using the following routing methods.

- Availability Routing: (Optional) To assign call routing rules with availability state.

- Power Routing: To set customized rules as per the requirement.

Using Availability Routing

The Availability Routing allows you to route your incoming calls for the following Availability states:

- Available

- In A Meeting

- Out of Office

- On Vacation

- Custom

- DND

You can configure availability routing using dialog box either with Mobility or without Mobility.

To configure availability routing with Mobility:

1. Launch the ShoreTel Connect client.

The dashboard is displayed.

2. Click the **<username>** tab.

Your profile information is displayed on the second pane.

3. Click **Preferences > Call Routing > Availability Routing.**

The availability routing screen is displayed on second pane.

4. In the **When** field, click the drop-down list, and select any one of the following Availability state:

- Available

- In A Meeting

- Out of Office

- On Vacation

- Custom

- DND

> **Note**
>
> By default, the incoming calls are routed to your extension and to your Mobility device. For more information on how to map your mobility device, see

5. Click **Star Wizard** on the right.

   The Mobile device with Mobility installed screen is displayed.

6. To specify the ShoreTel Mobility enabled device:

   ■ In the blank field, type in your 10-digit mobile number.

      If you do not have a mobility device, then click **My device with ShoreTel Mobility will not have a number associated with it**.

7. Click **Next**.

   The Simultaneous Ring screen is displayed.

8. To enable simultaneously ringing:

> **Note**
>
> By default, the Simultaneous Ring screen displays an extension and a mobility device that are already included for the simultaneous ring. The following options are displayed as already selected devices for the simultaneous ringing:
>
> ■ my extension
> ■ mobile connect client

You can enable an additional device to ring simultaneously, other than your extension and a mobility device. To configure an additional device, do the following:

   a. Check **Also simultaneously ring these numbers.**

   b. Click the **Select Number** drop-down list.

      A screen to specify additional phone numbers is displayed.

   c. Select the appropriate option and click **Use Selected Number.**

You have successfully added phone numbers to ring simultaneously for an incoming call.

9. Click **Next**.

   The Incoming Call Forwarding screen is displayed.

10. To enable call forwarding:

    You can enable call forwarding when you are not picking the call on the devices that are dedicated for simultaneous ringing. Further to configure for call forwarding, do any of the following:

> **Note**
>
> The devices dedicated for the simultaneous ringing are displayed, as follows:
>
> - my extension
> - mobile Connect client
> - <external number>
>
> If you are not available on any of the devices dedicated for the simultaneous ringing, then you can configure to route the incoming call either to your voicemail or to any other external number with appropriate permissions.

    a. Select **Keep ringing the numbers above**.

        The incoming calls will not be forwarded, and only the devices dedicated for the simultaneous ringing are permitted to ring.

    b. If you want to forward the incoming calls to your voicemail or to another contact, do the following:

        1. Select **Forward the call to** and click on the drop-down list, and either select **my voicemail**, or type in the contact name or the external number, if you have appropriate permissions.

            The incoming call is either forwarded to a voicemail or to specified contact.

        2. Click the drop-down list to select the number of rings before forwarding.

            The number of rings are set for your primary extension before the call is forwarded.

        3. In the **if I have more than 16 active calls forward immediately to** field, click the drop-down list and either select **my voicemail**, or type in the contact name or the external number, if you have appropriate permissions.

            The incoming calls are forwarded to a voicemail or to another contact, when you are already handling more than fixed number of active calls.

    c. Select **Always forward my calls to**. Click the drop-down list and either select **my voicemail**, or type in the contact name or the external number, if you have appropriate permissions.

        The incoming call is either forwarded to the voicemail or to a specified contact.

    You have successfully enabled the call forwarding to an incoming call.

11. Click **Next**.

    The Voicemail Greeting: Recording & Playback screen is displayed.

12. To enable voicemail greeting:

    You can allow the caller to hear your greeting when they reach your voicemail. To configure the voicemail greeting, do the following:

    a. Click the record icon to start recording your message. After completing, click the square icon in grey to stop the recording.

   b. Click the play icon to listen to the recorded greeting for any incoming voicemail.

   c. Click **Save Recording** to save the recorded greeting.

   d. Click **Discard recording** to discard the recorded greeting, and repeat steps 11a to 11c.

13. Click **Next**.

    The Interacting with Greeting screen is displayed.

14. To enable interaction with the voicemail greeting:

    After listening to the voicemail greeting, you can allow if the caller wants to leave a voicemail or not. To configure an interaction with the greeting, do the following:

    a. Select any of the following option under **Are callers allowed to leave a voicemail after hearing your greeting?**

      ■ Yes, callers can leave a voicemail

      ■ No, callers will not be able to leave a voicemail

    b. If you want to forward the incoming call to a particular extension number, then do the following:

      ■ In the **If callers press '0' while listening to your greeting Forward calls to** field, type in a contact name or an extension number.

    You have successfully configured the interaction with the greeting.

15. Click **Done**.

    You have successfully configured call routing with mobility.

    To configure availability routing without Mobility:

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **<username>** tab.

   Your profile information is displayed on the second pane.

3. Click **Preferences > Call Routing > Availability Routing.**

   The availability routing screen is displayed on second pane.

4. Click **Star Wizard** on the right.

   The Simultaneous Ring screen is displayed.

5. To enable simultaneous ring:

Note

By default, the Simultaneous Ring screen displays the device that is already included for the simultaneous ring. The following option is displayed as device already selected for the simultaneous ring:

- my extension

You can enable an additional device to ring simultaneously, other than your extension. To configure an additional device, do the following:

a. Check **Also simultaneously ring these numbers.**

b. Click the **Select Number** drop-down list.

A screen to specify additional phone numbers is displayed.

c. Select the appropriate option and click **Use Selected Number.**

You have successfully enabled simultaneous ring.

6. Click **Next**.

The Incoming Call Forwarding screen is displayed.

7. To enable incoming call forwarding:

You can enable incoming call forwarding when you are not picking the call on the devices dedicated for the simultaneous ringing. Further to configure for call forwarding, do any of the following:

Note

The devices dedicated for the simultaneous ring are displayed, as follows:

- my extension
- <external number>

If you are not available on any of the devices dedicated for simultaneous ringing, then you can configure to route the incoming call to your voicemail.

a. Select **Keep ringing the numbers above**.

The incoming calls will not be forwarded, and the devices dedicated for the simultaneous ringing are only permitted to ring.

b. If you want to forward the incoming calls to your voicemail, do the following:

1. Select **Forward the call to** and click on the down arrow icon, and select **my voicemail**.

The incoming call is forwarded to the voicemail.

2. Click the drop-down list to select a number for the rings before forwarding

The number of rings are set for your primary extension before the call is forwarded.

3. In the **if I have more than X active calls forward immediately to** field, click the down arrow icon and select **my voicemail**.

The incoming calls are forwarded to the voicemail when you are already handling more than fixed number of active calls.

c. Select **Always forward my calls to**. Click on the drop-down list and select **my voicemail**.

The incoming call is forwarded to the voicemail.

You have successfully enabled call forwarding for an incoming call.

8. Click **Next**.

The FindMe screen is displayed.

9. To enable FindMe:

a. Select **Enabled: Use my FindMe settings to continue routing the call**.

b. To configure FindMe Settings, do any of the following:

- Select **Ring my FindMe numbers sequentially before playing my voicemail**, and check **Prompt the caller to record their name**.

- Select **Play my voicemail first. If the caller presses 1 during the greeting then sequentially ring my FindMe numbers**, and check **Prompt the caller to record their name.**

c. To define FindMe numbers that will be used sequentially, do the following:

1. Click the **Select Number** drop-down list.

A screen to specify additional phone numbers is displayed.

2. Select the appropriate option and click **Use Selected Number.**

d. To add another FindMe number, repeat step 9c.

You have successfully enabled FindMe.

10. Click **Next**.

The Voicemail Greeting: Recording & Playback screen is displayed.

11. To enable voicemail greeting, see To enable voicemail greeting: on page 61

12. Click **Next**.

The Interacting with Greeting screen is displayed.

13. To enable interacting with the voicemail greeting, see To enable interaction with the voicemail greeting: on page 61.

You have successfully configured availability routing without Mobility.

Configuring Availability Routing Using Custom Settings

1. Launch the ShoreTel Connect client.

    The dashboard is displayed.

2. Click the **<username>** tab.

    Your profile information is displayed on the second pane.

3. Click **Preferences > Call Routing > Availability Routing.**

    The availability routing screen is displayed on second pane.

4. To configure a mobility device for the incoming calls, see To specify the ShoreTel Mobility enabled device: on page 59.

5. Click **Change** to configure the following individual options, as desired:

    ■   Simultaneous ringing

        □   For more information about configuring simultaneous ring with mobility enabled, see To enable simultaneously ringing: on page 59.

        □   For more information about configuring simultaneous ring without mobility enabled, see To enable simultaneous ring: on page 62.

    ■   Incoming call forwarding

        □   For more information about incoming call forwarding with mobility enabled, see To enable call forwarding: on page 60.

        □   For more information about incoming call forwarding without mobility enabled, see To enable incoming call forwarding: on page 62.

    ■   Voicemail Greeting: Recording & Playback

        For more information, see To enable voicemail greeting: on page 61.

    ■   Interacting with Greeting

        For more information, see To enable interaction with the voicemail greeting: on page 61.

You have successfully configured the Availability Routing using individual options.

Using Power Routing

The Power Routing allows you to create customized personal rules for call routing. You can also edit and delete the power routing rules.

Power Routing overrides the Availability routing.

Creating a Power Routing Rule

1. Launch the ShoreTel Connect client.

    The dashboard is displayed.

2. Click the **<username>** tab.

    Your profile information is displayed on the second pane.

3. Click **Preferences > Call Routing > Power Routing.**

    The My Power Rules screen is displayed.

4. Click **Create New Power Rule**.

5. Under **Rule Name** field, enter a <name> for the new power rule.

6. Under **When** field, choose a combination of the following conditions in order to forward a call:

    - + number matches

    - + dialed number

    - + my availability

    - + on the phone

    - + time is

7. To add a rule by matching a number, do the following:

    a. Click **+ number matches**.

        The number matching screen is displayed.

    b. Click the **The number is** drop-down list and select a suitable option.

        For few selected options, you may have to enter an associated number in the corresponding field.

    c. To create another rule, repeat steps 7a to 7b.

8. To add a rule based on the known dialed number, do the following:

    a. Click **+ dialed number**.

        The dialed number screen is displayed.

    b. Click inside the **Number caller dialed to reach me is** field and type in the known number.

9. To add a rule based on the availability, do the following:

    a. Click **+ my availability**.

        The availability screen is displayed.

    b. Check the following availability states, as required:

- Available

- In a Meeting

- Out of Office

- Vacation

- Custom

- DND

10. To add a rule if you are already on a phone, click **+ on the phone**.

The **I'm on the phone** screen is displayed.

11. To add a rule based on the time or on the day, do the following:

    a. Click **+ time is**.

The time screen is displayed.

    b. Select either of the following:

- If **Time is** selected, enter the from and to fields to apply the power rule.

- If **Day** is selected, check the days to apply the power rule.

12. Under **Then**, click **Forward call to** and select any of the following options:

- To forward the call to a voicemail, select the **my voicemail** option.

- To play a ring tone,

  - Click the **my voicemail** drop-down list to select **play ringtone**. An additional Standard Ring option is displayed.

  - Click on the drop-down list and select a ring tone option.

- Select and click inside the Select Number field, and type in the contact number.

13. Click **Create Rule**.

You have successfully created a power rule.

Modifying a Power Routing Rule

1. Launch the ShoreTel Connect client.

The dashboard is displayed.

2. Click the **<username>** tab.

Your profile is displayed on the second pane.

3. Click **Preferences > Call Routing > Power Routing.**

    The My Power Rules screen is displayed.

4. Click **Edit** on the existing power rule.

5. Edit the steps as required.

    For more information, see steps 6 to 12 of

6. Click **Save Rule**.

    You have successfully modified an existing power rule.

Deleting a Power Routing Rule

1. Launch the ShoreTel Connect client.

    The dashboard is displayed.

2. Click the **<username>** tab.

    Your profile information is displayed on the second pane.

3. Click **Preferences > Call Routing > Power Routing.**

    The My Power Rules screen is displayed.

4. Click **Delete** on an existing power rule.

    The power routing rule is deleted.

You have successfully deleted an existing power rule.

Managing Call Options

This section explains procedures for managing call options.

Managing Concurrent Calls

1. Launch the ShoreTel Connect client.

    The dashboard is displayed.

2. Click the **<username>** tab.

    Your profile information is displayed on the second pane.

3. Click **Preferences > Telephony.**

    The telephony screen is displayed.

4. Click the **Maximum number of concurrent calls** drop-down list, and select a number in the range configured by your system administrator.

You have successfully configured concurrent calling.

Managing Call Waiting

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **<username>** tab.

   Your profile information is displayed on the second pane.

3. Click **Preferences > Telephony.**

   The telephony screen is displayed.

4. Check **Suppress call waiting tone when I'm on a call**.

You have successfully suppressed the call waiting tone.

Managing Dial Tone for an analog phone

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **<username>** tab.

   Your profile information is displayed on the second pane.

3. Click **Preferences > Telephony.**

   The telephony screen is displayed.

4. Check **Suppress dial tone when I'm off-hook in headset mode on an analog phone**.

You have successfully suppressed the dial tone for an analog phone.

CHAPTER

7

Managing Instant Messaging

This chapter provides information on managing the instant messaging feature and includes the following sections:

Sending an Instant Message

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Find the contact.

   For more information, see Finding a Contact on page 20.

   The contact card details are displayed on the third pane.

3. In the IM input field, type in the message and press **Enter**.

You have successfully sent a message.

Managing Instant Messaging Notifications

This section explains procedures for managing instant messaging notifications.

Enabling IM Notifications

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **<username>** tab.

   The username page is displayed on the second pane.

3. Click **Preferences > Notifications > Popup.**

   The popup screen is displayed.

4. To receive a system notification for an incoming IM, do the following:

   - On Windows OS, select the **Show a system notification for an incoming IM** option**.** Do the following to further customize the IM notification:

      1. To see the IM message in the system notification, select the **Show IM content in the notification** option.

      2. To control the persistence of the IM notification on your system, select the **Keep notification on screen for** option, and click the drop-down list and select a number from the list.

   - On OS X, do the following:

      1. Under **Incoming IM**, click **Configure via OS X Notification Center.**

         The Notifications screen is displayed.

      2. In the Notification Center box, scroll down to click the ShoreTel Connect client icon.

         The ShoreTel Connect client alert style: screen is displayed.

      3. Click any of the following:

         - None

         - Banners

         - Alerts

   You have successfully enabled IM notifications.

Disabling IM Notifications

1. Launch the ShoreTel Connect client.

    The dashboard is displayed.

2. Click the **<username>** tab.

    The username page is displayed on the second pane.

3. Click **Preferences > Notifications > Popup**

    The popup screen is displayed.

4. For Windows, uncheck **Show a system notification for an incoming IM**.

5. For OS X, do the following:

    a. Click **Configure via OS X Notification Center...**

        The Notifications screen is displayed.

    b. Select **Do Not Disturb** on the left notification area.

        You have successfully disabled IM notifications.

Blocking IM Notifications

This section explains procedures to mute instant messaging notifications from specified users.

1. Launch the ShoreTel Connect client.

    The dashboard is displayed.

2. Click the **<username>** tab.

    The username page is displayed on the second pane.

3. Click **Preferences > IM > Block Notifications**

    The Block IM notification tab is displayed.

4. Click inside the **Drag or type contact name**, and either type, or drag and drop the contact.

5. Repeat step 4 to add another contact.

6. Click outside the box to save the changes.

You have successfully stopped notifications from specified users.

CHAPTER

8

Integration with Microsoft Exchange

This chapter provides information about integrating the ShoreTel Connect client with Microsoft Exchange:

Integrating the Connect Client with Microsoft Exchange

You can integrate the ShoreTel Connect client with Microsoft Exchange to use the following client features:

- Synchronize user's calendar and change availability state.

- Enable user to send invitations and notifications to Connect events through Outlook.

To integrate the ShoreTel Connect client with Microsoft Exchange:

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **<username>** tab.

   The second pane is displayed with information about your username.

3. Click **Preferences > Account > AD Credentials**.

   The Manage AD Credentials screen is displayed.

4. Enter your Microsoft Exchange/Outlook (Active Directory) credentials in the **User name** and **Password** fields.

5. Click **Save Credentials**.

   The credentials you entered are validated by the client and the **Verifying AD Credentials** message is displayed.

   When the credentials are successfully verified by the client, the **Unlink ShoreTel Connect from Exchange** link is displayed. You can click this link any time to disable the integration.

Integrating Voicemail with Microsoft Outlook

After integrating the ShoreTel Connect client with Microsoft Exchange, you can integrate the voicemail feature of the client with Outlook to ensure you receive email notifications for every received voicemail. This is helpful in situations where you miss listening to the voicemail because of a problem with your handset, or simply when you are away from your desk phone.

To integrate voicemail with Outlook:

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **<username>** tab.

The second pane is displayed with information about your username.

3. Click **Preferences > Voicemail > Outlook**.

The Outlook Integration screen is displayed.

4. Select the **Show my voicemails inline in my Outlook inbox** option.

The Connect client voicemail is successfully integrated with your Microsoft Outlook.

Integrating Outlook Contacts with the ShoreTel Connect Client

You can import your personal contacts from Microsoft Outlook into the ShoreTel Connect client so that you can call, message, or have a conference session with them from the client.

To integrate your contacts from Microsoft Outlook with the ShoreTel Connect client:

1. Launch the ShoreTel Connect client.

The dashboard is displayed.

2. Click the **<username>** tab.

The second pane is displayed with information about your username.

3. Click **Preferences > Outlook**.

4. Select the **Import my personal contacts from Outlook into ShoreTel Connect** option.

All your Outlook contacts are successfully imported into the ShoreTel Connect client.

Integrating Outlook Calendar with the ShoreTel Connect Client

You can integrate your Microsoft Outlook Calendar with the ShoreTel Connect client to integrate conferencing and availability features.

To integrate your Microsoft Outlook calendar with the ShoreTel Connect client:

1. Launch the ShoreTel Connect client.

The dashboard is displayed.

2. Click the **<username>** tab.

The second pane is displayed with information about your username.

3. Click **Preferences > Outlook**.

4. Select the **Sync my Outlook calendar with my ShoreTel Connect availability modes** option.

Your outlook calendar is successfully integrated with the Connect client.

The Connect client is now configured to indicate your availability as follows:

- **In a Meeting** when you are in a meeting/conference as appointed on your Outlook calendar.
- **Out of Office** when you have set out-of-office replies in Outlook.

CHAPTER

9

Managing Conferences

This chapter describes how to create and manage ShoreTel conferences and includes the following sections:

Creating a Conference

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **Events** tab.

   The list of upcoming and past events is displayed in the second pane.

3. Click **+New Event** at the bottom of the second pane.

   The event creation page is displayed on the third pane.

4. In the **Name** field, enter a suitable name for the conference you are about to create.

   This name is used in email notifications about conference sessions.

5. In the **Starts** fields, enter the date (can also be selected from the date pop-up) and the start time of the conference.

6. In the **Meeting Lasts** field, enter the duration of the meeting in hours and minutes.

7. From the **Occurs** drop-down list, select the recurring frequency of the conference.

> **Note**
>
> You will see the **Occurs** field only if you have not integrated the Connect client with Microsoft Exchange on your computer.

8. In the **On Site Location** field, enter the venue for the conference.

9. In the **Meeting type** field, enter either of the following types of conference you want to host:

   - **Collaborative**: In this type of conference, you only need to mention the organizers and presenters. You can use this when you are hosting a conference for a wide list of participants. In this conference type, everyone is a host and a presenter.
   - **Presentation**: In this type of conference, you need to mention the participants with the organizers and presenters. You can use this when you are hosting a conference for a limited number of participants.

10. In the **Organizers** field, enter the names of the people hosting the conference. You can enter the first three letters of the name and select the auto-completed contact.

11. In the **Presenters** field, enter the names of people presenting during the conference. You can enter the first three letters of the name and select the auto-completed contact.

12. If you are creating a custom type of conference, enter the names of the participants in the **Participants** field. You can enter the first three letters of the name and select the auto-completed contact.

13. In the **Agenda** fields, enter the agenda items of the conference with the respective time slots for each item.

> **Note**
>
> You must ensure that the total time alloted to the agenda items does not exceed the total duration of the conference, as entered by you in the **Meeting Lasts** field.

14. In the **Overview** field, enter a brief description of the purpose of the conference.

15. To attach any reference material for the participants, you can click **Choose from Dropbox** in the Files section. You must sign into Dropbox with your credentials for attaching files.

16. To configure settings for your conference, click to expand the **Meeting Settings** drop-down list.

    a. To set a password for your conference, select the **Protect Meeting with password** option and enter the password in the **Password** field.

    b. In the **Start the Meeting** section, you can choose either of the following options to configure when a meeting begins:

        ■ When anyone joins
        ■ When one of the organizers joins

    c. In the **Participants** section, you can configure the following options:

        ■ To announce the arrival of a participant on the conference call, select the **Announce when participants arrive** option, and select either of the following announcement options:

            ▫ Play a simple audio tone

            ▫ Prompt participants to record their name and announce when they try to join the meeting

        ■ To mute all participants joining the conference call, select the **Mute participants on entry** option**.**

        ■ To display all the participants name on the conference, select the **Show everyone's name to all participants** option.

        ■ In the **Allow participants to IM with** section, configure either of the following instant messaging options for participants:

            ▫ Everyone
            ▫ Just the organizers

        ■ In the **When dialing out to participants** section, configure either of the following dialing options for participants joining the conference:

            ▫ Must press one to enter audio portion of the meeting
            ▫ Participants are automatically added to the audio portion of the meeting

17. Click **Create Event Invite** to generate the invite.

The **Creating Conference** message is displayed at the bottom of the third pane.

If the ShoreTel Connect client is successfully integrated with Microsoft Exchange, you will see a **Create Conference Success Opening Outlook Please Wait** message. An email invite draft is opened in Microsoft Outlook, where you can review the content, set reminders and recurrence, and review the list of participants before sending the invite. If you do not see this invite, see Chapter 8, Integration with Microsoft Exchange on page 73 for information about integration.

If you have not integrated the ShoreTel Connect client with Microsoft Exchange, the new event is created and displayed with the ShoreTel assigned details as described in Table 3. Every time you click **Events** on the dashboard, the conference is listed on the **Upcoming** tab of the second pane.

Table 3: ShoreTel Conference Details

Conference Details	Description
ID	The meeting ID that is automatically generated by the ShoreTel system on creation of an event.
Leader Code	The access code for the leader/host to join and host the conference.
Local Dial-in number	The conference call dial-in number for host and participants.
<Web Conference link for leader/host>	The ShoreTel Conference web page link for the host.
Participant Code	The access code for the participants to join the conference call.
<Web Conference link for participants>	The ShoreTel Conference web page link for the participants.
Password (optional)	The password to join the secured conference call.

Creating a Conference from Microsoft Outlook

If you have successfully integrated Microsoft Exchange with the ShoreTel Connect client, you should be able to create a conference from Outlook by following the procedure outlined in this section.

To create a conference from Microsoft Outlook:

1. Launch Microsoft Outlook.

2. Click **New Items > Meeting**.

The **Untitled - Meeting** page is displayed in a new window.

3. Click the conference icon at the top right corner of the Outlook ribbon.

A ShoreTel conference is automatically generated with the details listed in Table 3 on page 80 and appended to the email invite.

4. In the **To** field, enter the list of participants you want to invite to the conference.

    You can click **Address Book** or **Check Names** to select or identify directory contacts respectively.

5. In the **Subject** field, enter the purpose of the conference.

6. In the **Location** field, enter the venue of the conference.

7. In the **Start time** fields enter the date and start time of the conference.

8. In the **End time** fields, enter the date and end time of the conference.

9. You can configure the responses you receive from participants by clicking **Response Options**.

10. You can set a reminder by selecting the time slot from the **Reminder** drop-down list.

11. You can select the conference to occur more than once by clicking **Recurrence**.

12. You can configure any other preferences for the conference by clicking the available Outlook options.

13. Click **Send**.

    The Conference is created and automatically updated in Outlook calendar.

Viewing Conferences

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **Events** tab.

   The second pane is displayed.

3. To view the list of conferences in the future, click the **Upcoming** tab.

   The list of all upcoming conferences is displayed on the second pane and is sorted by the date from the most recent to the most ancient.

4. To view the list of conferences in the past, click the **Past** tab.

   The list of all previous conferences is displayed on the second pane and is sorted by the date from the most recent to the most ancient.

Note

If you have integrated the ShoreTel Connect client with Microsoft Exchange, you will see all your conferences in the Outlook calendar.

Downloading the iCalendar Data (ICS) File for a Conference

ShoreTel Connect client generates an ICS file for every event if Microsoft exchange is not deployed. All participants can use this ICS file to populate their calendars with the meeting invite.

To download the Conference iCalendar date file for your calendar:

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **Events** tab.

   The second pane is displayed.

3. Click the **Upcoming** tab to look at all upcoming conferences.

4. Select the conference on the second pane for which you want to download the ICS file.

   The third pane is displayed with information about the conference.

5. Click **Download ICS file for External Calendar**.

   The **File Save As** dialog box is displayed. The default file name is `shoretel.ics` and the default path for saving the file is `C:\Users\<user>\AppData\Local\ShoreTel\Meetings`

6. Retain the filename and file location as is or rename the file and change the location as required, and click **Save**.

7. Locate the file on your computer and double-click to open the iCalendar file.

8. Review all the information about the conference and save to your calendar.

The conference is added to your calendar.

Joining a Conference

There are two ways of joining a conference from the ShoreTel Connect client:

1. Joining a Conference from the Notification Area: You follow this procedure if you see a notification for the upcoming conference in the notification area on the dashboard. The notification is usually sent 5 minutes prior to the conference.

2. Joining a Conference from the Events tab: If you wish to join the conference prior to seeing a notification in the notification area, you can follow this procedure.

Joining a Conference from the Notification Area

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. If you see a notification for the upcoming conference in the notification area on the dashboard, proceed to the next step. Else, see Joining a Conference from the Events tab on page 84, and follow the procedure listed in that section.

   The notification consists of two icons, a call icon and a launch icon, both of which are green in color.

3. Click the green call or launch icon to launch the conference.

   The second pane displays the dial-in options.

4. Do any of the following to dial into the conference:

   ❑ To configure a call back on a number you specify, click the **Call Me** option, enter the number on which you want to be called, and click **Call Me**.

   ❑ Click the green call icon on the second pane. If you have assigned a desk phone or a cell phone to the ShoreTel Connect client, the respective phone will ring. If nothing happens see Chapter 5, Managing Phones on page 35.

   You are successfully placed into the conference.

5. You can end the audio conference any time by clicking the red call-end icon on the second pane. To end the conference, click **Close [X]** in the conference notification on the dashboard.

Joining a Conference from the Events tab

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **Events** tab.

   The second pane is displayed.

3. Click the **Upcoming** tab to view all upcoming conferences.

4. Select the conference you want to join.

   The third pane displays information about the conference.

5. Click **Join Meeting**.

   The conference is launched in the second pane.

6. Do any of the following to dial into the conference:

   ▫ To take the call through the softphone (your computer and headset), click **Call via Computer Audio**.

   ▫ To configure a call back on a number you specify, click the **Call Me** option, enter the number on which you want to be called, and click **Call Me**.

   ▫ Click the green call icon on the second pane. If you have assigned a desk phone or a mobile phone to the ShoreTel Connect client, the respective phone will ring. If nothing happens see Chapter 5, Managing Phones on page 35.

   You are successfully placed into the conference.

You can end the conference any time by clicking the red call end icon on the second pane.

Joining a Conference from Your Calendar

If you have successfully integrated the ShoreTel Connect client with Microsoft Exchange or have downloaded and added the iCalendar date file to your personal calendar, you can join a conference by opening the appointment on your calendar.

To join a conference from your calendar:

1. Launch your calendar.

2. Open the conference appointment.

   The appointment contains details of the conference as described in Table 3 on page 80.

3. Click the **Click Here to Join** link.

   The ShoreTel Conferencing page is displayed in a new window.

4. Enter your name in the **Please type in your name** field, and click **OK**.

   You have successfully joined the web conference.

5. To dial into the conference, you can select the **I'll call this number** option or enable call back by providing your number in the **Call me at this number** field.

6. Click **OK**.

You have successfully joined the conference from your calendar.

Recording a Conference

After you have dialed into a conference, you can start recording the conference by using the ShoreTel Connect client.

To record a conference on the ShoreTel Connect client:

1. Launch the ShoreTel Connect client.

    The dashboard is displayed with a notification for the conference you have dialed into.

2. Click the conference notification.

    The conference progress is displayed on the second pane.

3. Click the **REC** icon to start recording the conference.

    The **REC** icon turns red to indicate that recording is in progress.

4. After you are done recording the conference, click the **REC** icon again.

    The recording stops and you receive the recording as a voicemail message in the notification area and on your desk phone (if configured), and also in two emails in your Outlook inbox (one notification from ShoreWare Voice Mail to notify you, and a second email from your extension containing the recorded audio clip).

> **Note**
>
> The conference may still be in progress when you stop the recording. To leave the conference you must click the red call end icon as explained in

Canceling a Conference

You can cancel a ShoreTel conference any time after creating it by following the procedures in this section.

There are two ways of canceling a conference:

- Canceling a Conference from the Connect Client on page 87

- Canceling a Conference from Microsoft Outlook on page 87

Canceling a Conference from the Connect Client

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **Events** tab.

   The second pane is displayed.

3. To view the list of conferences in the future, click the **Upcoming** tab.

   The list of all upcoming conferences is displayed on the second pane and is sorted by the date from the most recent to the most ancient.

4. Click the conference you want to cancel.

   Information about the conference is displayed on the third pane.

5. Click **Cancel Meeting** at the bottom of the third pane.

6. Click **Cancel Meeting** in the confirmation dialog box.

   The **Canceling Conference** message is displayed at the bottom of the third pane. This message is followed by **Opening Outlook Please Wait** message and the Outlook invite is launched (only if you have integrated with Microsoft Exchange).

7. Click **Send Cancellation** in the Outlook invite cancellation window to notify participants of the cancellation.

The conference is successfully canceled.

Canceling a Conference from Microsoft Outlook

If you have integrated the ShoreTel Connect client with Microsoft Outlook, you can cancel a conference from the Outlook client by following the procedure described in this section.

To cancel a conference from Microsoft Outlook:

1. Launch Microsoft Outlook.

2. Open the conference appointment on the Outlook calendar.

3. Click **Cancel Meeting** at the top left corner of the Outlook ribbon.

   The cancellation email is displayed in the same window.

4. Click **Send Cancellation** to notify participants of the cancellation.

The conference is successfully canceled.

CHAPTER

10

Conferencing Using ShoreTel Connect Client For Web

Overview

The ShoreTel Connect client for Web is used to launch ShoreTel Conferencing without the ShoreTel Connect client. This feature is useful for remote users who have not installed the Connect client on their systems.

By using the Connect client for Web, you can join a ShoreTel Conference from any non-ShoreTel network without entering any authentication details. Organizers who join the conference through ShoreTel Connect client for Web are in the meeting as participants, not presenters or organizers.

Using the ShoreTel Connect Client for Web

1. Launch the participant URL (provided in the meeting invite sent by the conference host) in the web browser.

2. Click **I Agree**.

   The Connect client for web home page is displayed.

   The navigation pane on the left contains the conferencing menu. It displays the following details:

   - **Now Sharing**: The contact currently sharing the screen.

   - **Now Speaking**: The contact currently speaking on the conference.

   - **Group Chat**: Public chat window for all conference participants

   - **Attendees**: List of participants on the conference.

3. Enter your name in the **Introduce yourself as** box at the bottom of the navigation pane.

4. You can dial into the conference by using the following call-in option on the task bar at the bottom of the page:

   - **Call Me:** By entering your contact number in this box, and clicking **Call Me**, you receive a call back on the specified number. On answering the call, you are automatically connected to the conference joining IVR. You are prompted to press 1 based on the meeting settings.

5. You can manage the conference by clicking any of the following icons on the task bar at the bottom of the page:

   - **Call**: You can leave the call any time during the conference, by clicking the red call end icon on the task bar.

   - **Mute**: You can mute and unmute your audio during the call by clicking the mute icon on the task bar.

   - **Share**: You can share your screen, a portion of the screen, or an application window, by clicking the share icon on the task bar. You can learn more about this in Using Screen Sharing on page 91.

■ **Add contact**: You can click the add contact icon to add a contact to the conference.

■ **Raise hand**: You can click the raise hand icon to indicate to the host/presenter that you would like to say something on the conference. This is generally used to ask the host a question.

6. After the conference has ended, close the window to leave the conference.

Using Group Chat

You can use the group chat feature during the ShoreTel conference to communicate with all participants.

To use group chat:

1. Click the Group Chat icon on the navigation pane.

    The group chat window is displayed.

2. Enter your message in the IM input field at the bottom of the window, and press **Enter**.

    Your message is sent to all participants currently logged into the conference.

Using Screen Sharing

You can use the screen sharing feature to present material to the participants. You can share material with the participants in any of the three ways explained in this section.

Sharing the Entire Screen

You can share your entire computer screen with the participants, by choosing this option. When you enable this option, all participants can view the entire computer screen and all your actions on the computer, until you pause or stop the sharing.

To enable full screen sharing:

1. Click the share icon on the conference task bar.

2. Click **Share Full Screen**.

    If your browser needs a software to be installed (the first time that you use the sharing feature), select the appropriate option in the pop-up window. After the software or plugin has been installed, screen sharing is enabled.

    When full screen sharing has been enabled, the edges of the screen are outlined by a green border. This indicates that the portion inside the green rectangular area is going to be shared. By default, the sharing is paused until you manually start sharing.

3. Click the Play icon at the top of the screen to resume sharing.

4. When you are done sharing, click the close icon at the top of the screen to stop sharing.

Sharing a Rectangular Portion of the Screen

If you do not want the participants to view your entire screen during the screen sharing session, you can choose to share only a rectangular portion of your screen that you can enlarge and move around as needed.

To enable rectangular area sharing:

1. Click the share icon on the conference task bar.

2. Click **Share Area**.

    If your browser needs a software to be installed (the first time that you use the sharing feature), select the appropriate option in the pop-up window. After the software or plugin has been installed, screen sharing is enabled.

    When rectangular area sharing has been enabled, a green rectangular window is displayed. This indicates that the portion inside the green rectangular area is going to be shared. By default, the sharing is paused until you manually start sharing.

3. Click the Play icon at the top of the rectangular area to resume sharing.

4. When you are done sharing, click the close icon at the top of the rectangular area to stop sharing.

Sharing an Application Window

If you want to share only a particular application with the participants and keep everything else private, then you can use the application window sharing option.

To enable application window sharing:

1. Click the share icon on the conference task bar.

2. Click **Share Window**.

    If your browser needs a software to be installed (the first time that you use the sharing feature), select the appropriate option in the pop-up window. After the software or plugin has been installed, screen sharing is enabled, and the application selection window is displayed.

3. Select the application you want to share with the participants in the application selection window.

    The selected application is enabled for sharing and is marked by a green border to indicate the area that is going to be shared. By default, the sharing is paused until you manually start sharing.

4. Click the Play icon at the top of the application window to resume sharing.

5. When you are done sharing, click the close icon at the top of the application window to stop sharing.

CHAPTER
11

Sharing on the ShoreTel Connect Client

This chapter provides information about sharing screens and files and includes the following sections:

Sharing Screens with a Contact

The ShoreTel Connect client enables easy sharing of screens with your contact.

To share screens with a contact:

1. Launch the ShoreTel Connect client.

    The dashboard is displayed.

2. Locate the contact you want to share screens with by entering the contact name/number in the search bar or by clicking the **People** tab.

    The second pane is displays the contact.

3. Click the contact on the second pane.

    The third pane is displayed with information about the contact in the top portion and history with the contact in the bottom portion.

4. Click the three-point icon in the top portion for sharing your screen.

Note

If you want to call your contact, prior to sharing your screen, see Step 7.

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5. Do one of the following:

    ■   Click **Share Full Screen**: This enables sharing of your entire computer screen with your contact. Anything you do on your screen is projected to your contact.

    ■   Click **Share Area**: This enables sharing of a movable rectangular area that you can use to share specific portions of your screen.

    ■   Click **Share Window**: This enables sharing of any of the client application windows you have open on your computer. For example, you can choose to share only the Microsoft Outlook Email application window to your contact.

    A screen sharing invite is sent to your contact as a notification. The contact must either click the green accept icon to accept viewing your screen, or the red end close icon to reject the sharing invite. During this time, your computer screen is paused for sharing and is marked by a green rectangular border for marking the area that is going to be shared.

6. After your contact accepts your sharing invite, click the play icon at the top of the screen to resume sharing.

    The shared screen is displayed in your contact's third pane.

7. To call or have a conference with your contact, click the green dial icon at the top of the third pane.

    For information about using this feature, see

8. To end the screen sharing session, click the close icon at the top of the screen.

A notification is displayed in your contact's third pane that indicates that you are no longer sharing your screen.

CHAPTER

12

Managing your Account

This chapter provides information about managing the user account using ShoreTel Connect client, and includes the following section:

Enabling External Access to your Availability State

1. Launch the ShoreTel Connect client.

    The dashboard is displayed.

2. Click the **<username>** tab.

    Your profile information is displayed on the second pane.

3. Click **Preferences > Account > Access**.

    The Availability State screen is displayed.

4. In the **Drag or type contact name...** field, type the contact name.

    The contact name is populated in the field.

5. Repeat step 4 to add another contact.

You have successfully enabled access to other users for managing your availability.

Managing Notifications

This section provides information on how to manage notifications for your account.

Setting a Sound Notification

You can create a sound notification to identify a specific event, such as a voicemail, a call from an internal or external number, a monitored call, a shared call, or to identify a new or an existing conversation.

To set a sound notification:

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **<username>** tab.

   Your profile information is displayed on the second pane.

3. Click **Preferences > Notifications > Sounds**.

   The sounds screen is displayed.

4. In the Audio Alerts field, select **ON**.

5. In the **For event** field, click the drop-down list on the right, and select any of the following event:

   - new voicemail
   - call from an internal number
   - call from an external number
   - new IM message initiating a new conversation
   - new IM message initiating an existing conversation
   - monitored call
   - shared line call

6. Select **Play alert**, and do the following:

   - Click the drop-down list on the right, and select a required sound from the list.

   Note
   Other than the default list of sounds, you can also add or remove a new .wav file.

You have successfully set a sound notification to identify an event, such as voicemail, call, or an IM.

Managing History

You can view the history of all the interactions either for all the contacts at once or only for a specific contact, as follows:

-
-

Viewing Interaction History with all Contacts

1. Launch the ShoreTel Connect client.

   The dashboard is displayed.

2. Click the **Recent** tab.

   The Recent screen is displayed

3. Click the drop-down list on the top-right corner to filter for any specific interactions:

   - Everything
   - Calls
   - Voicemails
   - Messages

   By default, the Everything option is displayed in the drop-down list.

4. To view the history of interactions with all contacts:

   a. From the drop-down list, select **Everything**.

   b. Click the **All** tab.

   The following list of interactions is displayed:

   - received, dialed, and missed calls
   - sent and received IMs
   - received voicemails

5. To view only missed interactions:

   a. From the drop-down list, select **Everything**.

   b. Click the **Missed** tab.

   The list of all missed interactions, such as calls and voicemails are displayed in red.

6. To view flagged voicemails:

   a. From the drop-down list, select **Everything** or **Voicemail**.

      b. Click the **Flagged** tab.

The list of flagged voicemails is displayed.

7. To view deleted voicemails:

      a. From the drop-down list, select **Everything** or **Voicemail**.

      b. Click the **Deleted** tab.

The deleted voicemails is displayed.

8. To view only the call interaction, select **Calls** from the drop-down list.

The list of calls (received, dialed, and missed) is displayed.

9. To view only the IM interaction, select **Messages** from the drop-down list.

The list of sent and received IMs is displayed.

You have successfully viewed call history for all contacts.

Viewing Interaction History of a Contact

1. Launch the ShoreTel Connect client.

The dashboard is displayed.

2. Find a contact.

For more information, see

The third pane is displayed.

3. To view all interactions from the history board.

      a. From the history board, click the drop-down list on the top-right corner.

      b. Select **Everything**.

The list of all interactions with the contact is displayed.

4. To view only call interactions with the contact, do the following:

      a. From the history board, click the drop-down list on the top-right corner

      b. Select **Calls**.

The list of call history is displayed. Click on each call entry to see the details of origin of the call, duration of the call, call routing slip, and to enter any call note.

5. To view only the Voicemail interaction with the contact from the history board:

      a. From the history board, click the drop-down list on the top-right corner.

        b. Select **Voicemails.**

The list of voicemail history is displayed. For more information about voicemail reply, forward, and delete, see the following sections:

- Replying to Received Voicemail on page 55

- Forwarding a Received Voicemail on page 55

- Deleting a Received Voicemail on page 56

6. To view only the IM interaction with the contact:

        a. Click the drop-down list at the top-right corner.

        b. Select **Messages**.

The list of chat history is displayed.

You have successfully viewed the interaction history for a contact.

CHAPTER

13

Managing Workgroups

This chapter provides information about managing workgroups using ShoreTel Connect client and includes the following sections:

Workgroups Overview

The Workgroups tab can be seen on ShoreTel Connect client dashboard when agents and supervisors are members of a workgroup. You can see any active workgroup calls for a user and the current workgroup state of the user in the Workgroups tab.

The differentiators of Workgroups state in the Dashboard and the Workgroup states of Agents and Supervisors are listed in Table 4.

Table 4: Workgroups States

Color	State	Description
Green	Logged In	Logged into Workgroups
Grey	Logged Out	Logged out Workgroups
Yellow	Wrap Up	Agent/Supervisor is performing wrap up work for a workgroup call.

Workgroups Access Types

The user must be a member of a workgroup and must have a valid license type to view the information about workgroups. The license type of the member determines what type of member the user is.

There are two types of workgroup members:

- **Agent**: These users have the Workgroup Agent license type and access to workgroup information, but not agent information.

- **Supervisor**: These users have the Workgroup Supervisor or Operator license type and access to all workgroup and agent information. They must also be members of a workgroup.

Viewing Workgroups Information

Every time you click Workgroups on the dashboard, the workgroup information is displayed in the second pane with the workgroup name. The workgroup supervisors or operator access type users can filter this information by queued calls, agents, or voicemail messages for a specific workgroup.

The following information is displayed for each workgroup in the condensed view:

- Workgroup name

- The number of calls that are currently queued to the workgroup.

- The number agents logged into the workgroup.

- The number of voicemail messages to the workgroup.

Managing Agents

Supervisors can control the following actions for agents:

- Pick up a call

- Unpark a call

- Call an agent

- Call the voicemail mailbox

- Instant messaging

- Log on an agent

- Log off an agent

- Put the agent in Wrap Up state

- Change the Call Handling Mode of an agent (the supervisor is configured to change the Call Handling Mode Delegation for an agent)

> **Note**
>
> To enable the pick up a call and unpark a call features, the user must set the Telephony Feature Class of Service to Allow Call Pickup in ShoreTel Connect Director.

Supervisors' class of service must be configured in ShoreTel Connect Director to perform the following actions on the agents:

- Intercom

- Whisper page the agent

- Silent coach the agent

- Barge in on the agent

- Silent monitor the agent

- Setting a Sound Notification

For more information about configuring and managing agents, see the *ShoreTel Connect System Administration Guide*.

Filtering Queued Calls

When a user filters the workgroup information by queued calls, the user can see the name of the caller or telephone number if caller name is not associated with the call and any one of the following information:

■ Duration of the call queued to the workgroup

■ Duration of the call remained in the system

■ DNIS of the call

> **Note**
>
> To pick calls from the queued calls list, agents and supervisors must select Allow agents to pickup from queue option in ShoreTel Connect Director.

Filtering Voicemail

When a user filters the workgroup information by voicemails, the voicemail details appears. For more information about the voicemail details, see Managing Voicemail on page 50. Users can check their voicemails without logging in to a workgroup.