

# ***RELEASE NOTES***

## **ShoreTel 6.1 ShoreWare™ Call Manager Software**

Version 1.0

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## Introduction

This document defines the new features as well as installation and upgrade requirements for ShoreTel 6.1 ShoreWare Call Manager Software.

**NOTE:** Call Manager only displays features that have been selected for the user by the system administrator. Enabling and disabling of system features is performed by the system administrator in ShoreWare Director, and cannot be changed by the end user.

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## User Features

### *Bridged Call Appearances*

#### *Overview*

The **Bridged Call Appearances** (BCA) feature is intended for key system environments (a small office or branch office), such as an auto dealership that has 4 trunks and 8 IP phones, or perhaps a bank with 8 trunks and 16 IP phones. As implied by the name, the BCA feature provides “bridged” line appearance information when a call comes into the office on a trunk, and offers the benefit of faster call handling between users with shared answering. (To put it colloquially, if you have ever been in a grocery store and heard a voice on the intercom say “Shelly, call on line 1 – it’s your husband,” then you already understand what this feature does.)

The way the feature works is that a custom button on every IP phone is configured for BCA functionality, such that when a call arrives, the BCA-programmed custom button will blink green on all of the IP phones. Assuming someone in the sales department answers the call, the LED on that person’s phone will become solid green, and the LED on the other IP phones in the service and support departments will turn solid red.

In this manner, the call appearance information is shared (or bridged) across the different departments. Previous releases attempted to provide this same functionality, but as soon as the call was answer in one department, the call appearance information dropped off the other phones and the information was no longer bridged (and this resulted in confusion when other calls arrived).

For outbound calls made using one of the custom buttons that have been programmed with the bridged call appearance feature, the user must enter a trunk access code. The LED on the outbound caller’s phone becomes solid green, and the associated button on all of the other phones become solid red. If the call is placed on hold, the associated LEDs on all phones blink green. A button can be programmed for each position in the call stack.

**Note:** Pressing the top-most BCA custom button for outbound calls does not necessarily access trunk 1. There is no one-to-one correlation between the BCA-programmed custom buttons and the trunks, as might be expected based on the behavior of other systems. Rather, trunks can be selected for outbound calls in a somewhat random manner, based upon how the administrator has configured the system.

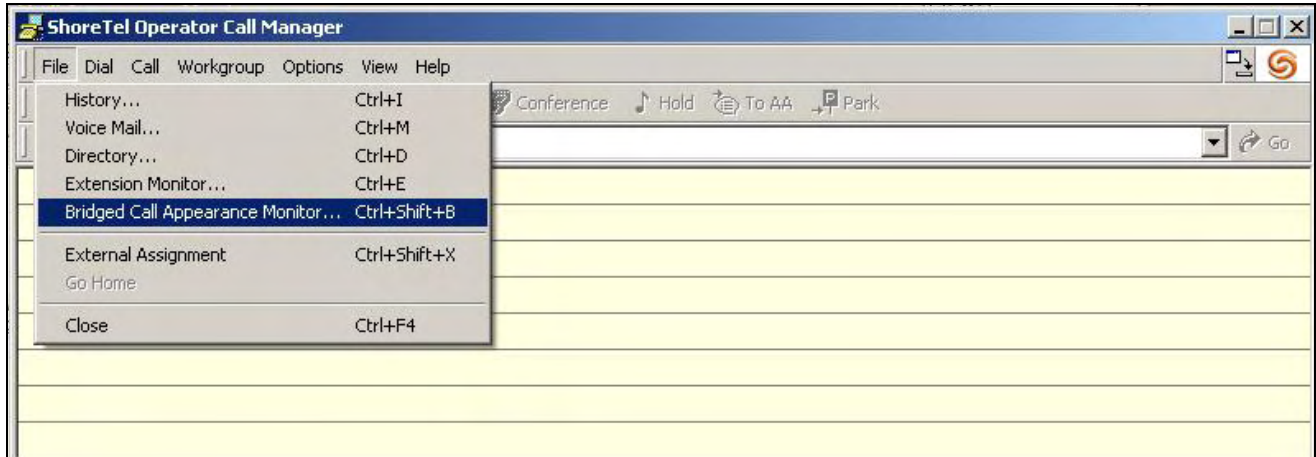
Another benefit of the new BCA feature is that an outbound caller-id can be associated (via Director) with that button. The following rules determine which caller-id is displayed when an outgoing call is made using BCA:

- *Outbound to an internal extension* – the name and number of the user that initiated the BCA call will be used, and if that user is a “private” user, then the caller-id is blank.
- *Outbound to an external number* – the caller-id will be used in following order, based on availability:
  - Outbound caller-id configured for that BCA
  - DID number configured for that BCA
  - External identification or caller-id number of the user that initiated the BCA call
- *Outbound to an external emergency number (such as 911)* – the emergency identification or a CESID number of that user will be sent.

## Configuration

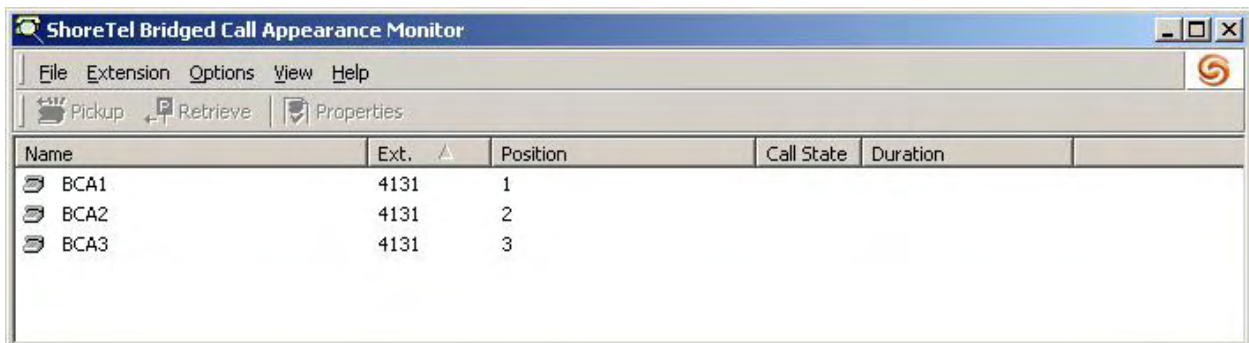
Configuration of the Bridged Call Appearances feature can be performed by your system administrator via ShoreWare Director. Alternatively, with proper permissions, you can configure the feature via PCM by following the procedure below:

1. Launch **Operator Call Manager** (PCM) on your client machine. (You must have operator client type.)
2. Click on the **File** menu and select **Bridged Call Appearance Monitor**, as shown below.



**Figure 1 – Using PCM to configure the client machine for BCA**

3. When you select **Bridged Call Appearance Monitor**, a pop-up window similar to the one shown below appears.



**Figure 2 – ST Bridged Call Appearance Monitor window**

When a call arrives, the phone icon at the far left column will change to indicate an incoming call. At this point, you can right-click on the call and select **Pickup**.

### Other options:

- If the call has been placed on hold, you can right-click the call and select **Retrieve**.
- Right-click and select **Edit Call Notes** to leave notes about the time, date, and purpose of the call.
- Right-click and select **Properties** for more information about the call.

## Centrex Flash

### Overview

This release offers the ability to program one of the custom buttons with Centrex Flash, in order to transfer the call to another number. This feature can be assigned to the custom button on any of the phones that support programmable buttons (IP212k, IP230, IP530, IP560, BB24). The new Centrex Flash functionality can be assigned to a programmable custom button such that when you press that button, a flash is generated<sup>1</sup> on the current call, dial-tone is presented by the central office (CO), and you are then free to dial any PSTN number. At this point, you should wait until ring-back is heard and then hang up the handset to complete the transfer.

Note that the user will be connected directly to the central office, so there will be no access code required, no permissions checking, no account code support, and no CDR logging of the second call.

This new Centrex Flash functionality is useful in branch offices or small office environments with a limited number of analog Centrex lines. If an external caller needs to be transferred to an external number, the two trunks will be cleared, instead of quickly busying out the trunks after a few transfers. In this manner, the feature reduces the number of physical trunks needed to transfer calls, since no trunks are in use after the transfer is completed.

### Details:

- Centrex transfer is supported only on analog loop-start trunks. If the call is not on an analog loop-start trunk, the operation will have no effect.
- The trunk on which the call exists must be configured on one of the following switches: ShoreGear 40/8, ShoreGear 60/12, ShoreGear 120/24, ShoreGear-E1, ShoreGear-T1.
- The feature replaces a trunk-to-trunk transfer, in which two trunks are tied up for the duration of the call.
- The current call must be connected and also must be a two-party call.

### Configuration

These configurations can be performed by your system administrator via ShoreWare Director, or if you have one of the phones listed above that supports this feature, you can program one of the custom buttons by following the procedure below:

1. Press the **Options** button on your phone, followed by your password and **#**.
2. Scroll to option **4. Program Buttons**.
3. Press the **Edit** soft key (IP530/560 phones) or press **#** to select this option.
4. Press the custom button to which you would like to assign the Centrex Flash feature.
5. Scroll to **Centrex Flash** from the list of functions.

**Note:** The custom buttons on some phones, such as the IP212k, can only be configured for Call Appearance or Dial Number (i.e. speed dial) using the phone interface. To program other functions, such as Centrex Flash, these phones must be configured via ShoreWare Director.

6. Press the **Next** soft key (IP530/560 phones) or **#** to confirm.
7. Enter a descriptive word that will act as a label to identify the button on the phone's LED display.  
**Note:** You may need to press the **1 -> Aa** button or soft key to toggle the keypad between numbers and letters.
8. Press the **Done** soft key (IP530/560 phones) or **#** to confirm.

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<sup>1</sup> Once flash is generated you can use relevant Centrex features, since you are talking directly to the CO.

## Personal Assistant Enhancement 00 to Voice Mail

### Overview

The **Personal Assistant Enhancement 00 to VM** feature allows a ShoreTel user to reach his or her personal assistant from the voice mail menu. This can be helpful if a user is checking his voice mail and he wants to quickly reach his personal assistant to communicate something he heard in a voice message. By pressing **0** from the main voice mail menu, he will have immediate access to that assistant. Alternatively, he can press **00** while listening to a voice mail message to reach his personal assistant.

This new feature is similar to the existing behavior, which allowed an external caller dialing into a ShoreTel user's voice mail to press 0 to reach the assistant of the person they were trying to reach.

Once this feature has been activated, we recommend re-recording your greeting to inform external callers that they must press 0 to reach the assistant. Although the addition of this feature is reflected in the voice mail prompts for internal users, external users will not know that they must press 0 to have their call forwarded to the assistant.

### Configuration

These configurations can be performed by your system administrator via ShoreWare Director. Alternatively, you can configure this feature via PCM by following the procedure below:

1. Launch **Personal Call Manager (PCM)** on your client machine.
2. Click on the **Options** menu and select **Configure ShoreTel System** to display a window similar to the one shown below:

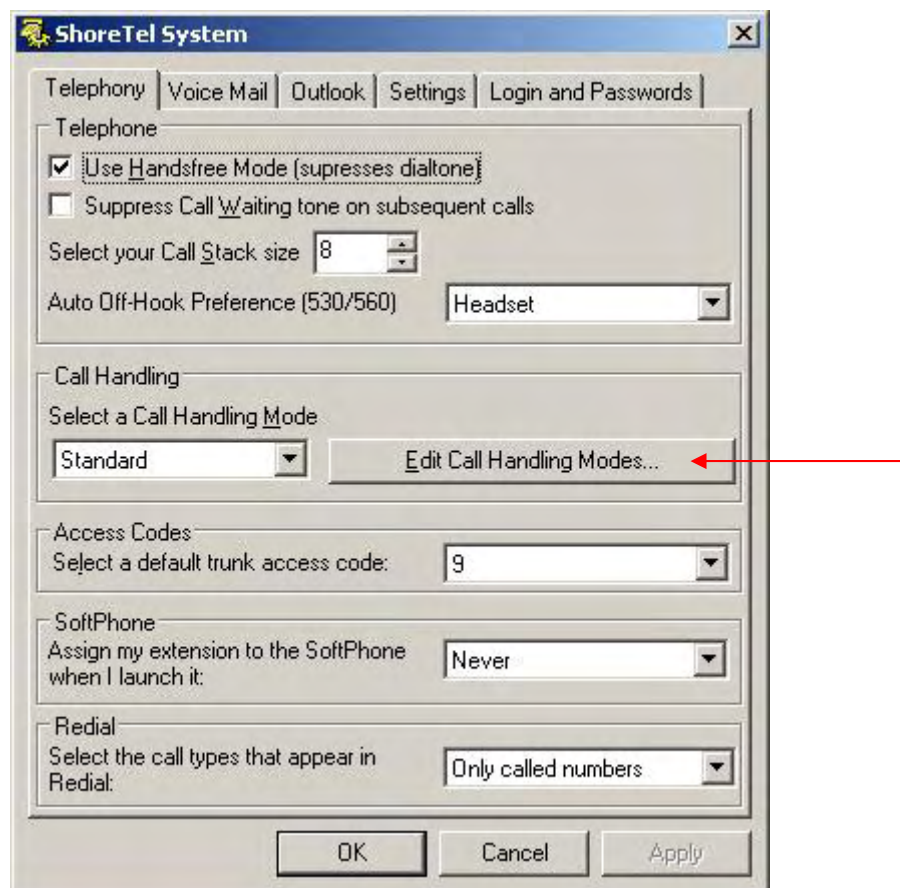
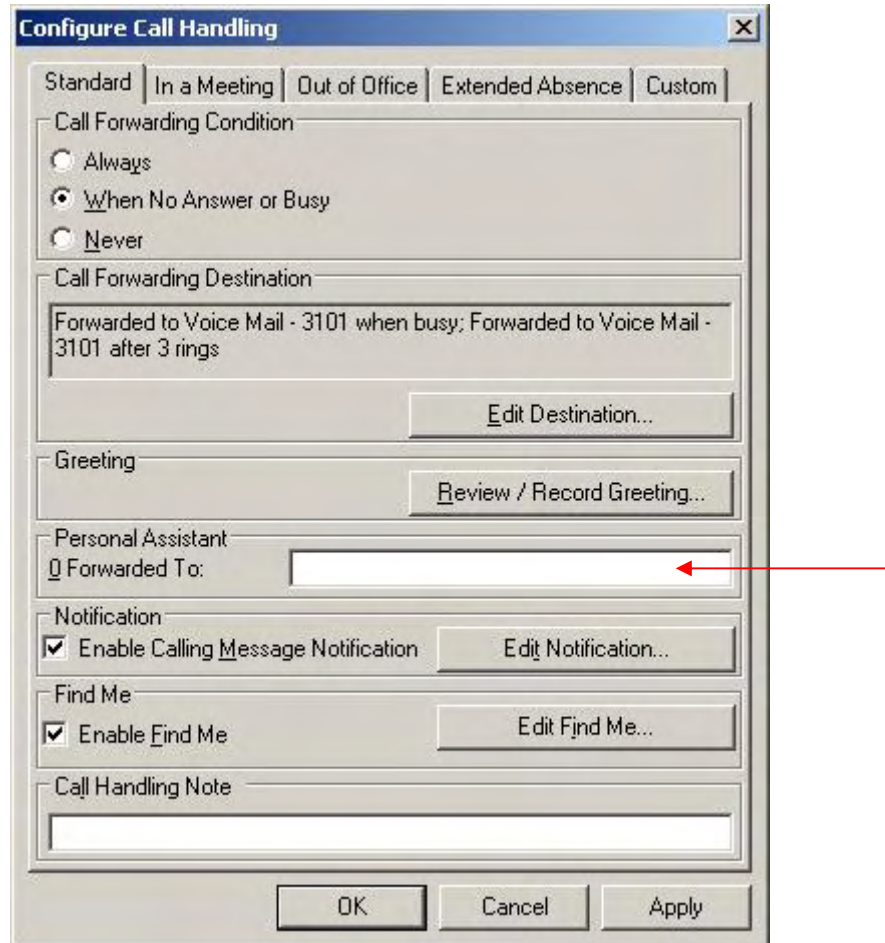


Figure 3 – Make sure the Telephony tab is selected

3. Click on the **Edit Call Handling Modes** button, as indicated by the arrow in Figure 3. The following window appears:



The screenshot shows the 'Configure Call Handling' dialog box with the following sections and options:

- Standard** | In a Meeting | Out of Office | Extended Absence | Custom
- Call Forwarding Condition**
  - Always
  - When No Answer or Busy
  - Never
- Call Forwarding Destination**

Forwarded to Voice Mail - 3101 when busy; Forwarded to Voice Mail - 3101 after 3 rings

Edit Destination...
- Greeting**

Review / Record Greeting...
- Personal Assistant**

Forwarded To:
- Notification**
  - Enable Calling Message Notification
  - Edit Notification...
- Find Me**
  - Enable Find Me
  - Edit Find Me...
- Call Handling Note**

Buttons: OK, Cancel, Apply

**Figure 4 – Enter the extension of your personal assistant**

4. In the **Personal Assistant 0 Forwarded To** field, enter the extension of your personal assistant. When you press 00 while listening to voice mail messages, this is who will be dialed.  
**Note:** If the field is populated it probably means your system administrator has already configured this feature for you via ShoreWare Director.
5. Click **OK** to store your changes.

## ***Two Line Caller ID Display***

### ***Overview***

The Two Line Caller ID Display feature displays the caller name and number on two separate lines for incoming calls and outbound calls. Once the call has been answered, the caller name and number will remain on two separate lines. This new behavior differs from previous releases in that previous releases consolidated the information into one line once the call had been answered.

### ***Details:***

- The new feature is implemented on the IP230 and IP530/560 phones.
- The caller name and number are always displayed on the top two lines, regardless of which call key (i.e. custom button) is selected.
- This feature only works when there is one active call. If there is more than one call, the caller name and number will be abbreviated and consolidated on one line.
- The Two Line Caller ID Display also applies to picking up the call up from a monitored extension and un-parking a call.
- The call timer stays in alignment with the active call key, regardless of how many calls there are.

### ***Configuration***

No configuration is necessary for this feature.

## Telephones

### *ShoreTel IP Phone (IP 212k)*

#### Overview

The new 212k IP phone is designed to function as a key phone and offers 12 custom buttons that can be used for line appearance, extension monitoring, speed dial, and other functions. The 212k is ideal for small offices and branch offices that require key system functionality.

- For detailed information on available options and how to use them, read the *ShoreTel 212k IP Phone Telephone User Interface Guide* (available at <http://www.shoretel.com/>).
- For installation instructions refer to the *ShoreTel 212k IP Phone Quick Install Guide* (included with every phone).
- Refer to the *ShoreTel 6.1 Planning and Installation Guide* for information regarding assigning network parameters to the phones.



#### Features:

##### IP 212k – General User

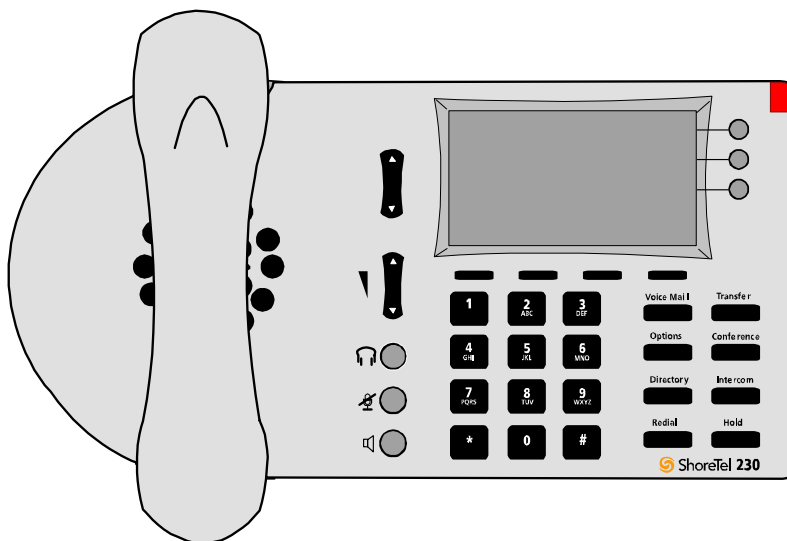
- Scrolling text allows for the display of more information
- Menu and Select buttons provide services similar to soft keys and scroll bar, and assist in phone navigation and programming
- 8 function keys (Voice Mail, Transfer, Options, Conference, Directory, Intercom, Redial, Hold)
- Ethernet Switch port allows connection of a PC to the back of the phone.
- The first (upper left-most) custom button is reserved for line appearance only and cannot be configured to perform other functions.

## ShoreTel IP Phone (IP 230)

### Overview

The new ShoreTel IP 230 Phone is a full-featured yet inexpensive IP phone that is similar to the ShoreTel IP 210 phone, but with the added functionality of programmable buttons.

- For detailed information on available options and how to use them, read the *ShoreTel 230 IP Phone User Interface Guide* (available at <http://www.shoretel.com/>).
- For installation instructions, refer to the *ShoreTel 230 IP Phone Quick Install Guide* (included with every phone).
- Refer to the *ShoreTel 6.1 Planning and Installation Guide* for information regarding assigning network parameters to the phones.



### Features:

- The IP 230 has 3 custom buttons that can be programmed for extension monitoring, speed dial, and other functions. Note that the top-most button is reserved for line appearance.
- Monochrome black and white display
- Each "button" is an LED-enabled hard key and has an associated 6 character label on the LCD.<sup>2</sup>
- 8 function keys (Voice Mail, Transfer, Options, Conference, Directory, Intercom, Redial, Hold)
- Ethernet switch port allows connection of a PC to the back of the button box.

<sup>2</sup> Note that one of these characters is reserved for an icon, so only 5 characters are available for the label.

## ShoreTel IP Phone (IP 560g)

### Overview

The new 560g Gigabit Ethernet IP phone offers

- For detailed information on available options and how to use them read the *ShoreTel 560g IP Phone Telephone User Interface Guide* (available at <http://www.shoretel.com/>).
- For installation instructions refer to the *ShoreTel 560g IP Phone Quick Install Guide* (included with every phone).
- Refer to the *ShoreTel 6.1 Planning and Installation Guide* for information regarding assigning network parameters to the phones.



### Features:

#### IP 560g – General User

- Offers the same features and functionality of a standard 560 phone
- Supports 10BaseT, 100BaseT, and 1000BaseT operations
- 6 custom buttons that can be used for line appearance and other functions
- 8 function keys (Voice Mail, Transfer, Options, Conference, Directory, Intercom, Redial, Hold)
- Gigabit Ethernet Switch port allows connection of a PC to the back of the phone.

## System Requirements

### Required Desktop PC Configurations

Operating Systems	<p>Windows XP – Professional</p> <ul style="list-style-type: none"> <li>• Service Pack 1 and 2</li> <li>• Themes Supported</li> </ul> <p>Windows 2000 Professional</p> <ul style="list-style-type: none"> <li>• Service Pack 4 or Greater</li> </ul> <p>Windows 2000 Terminal Server</p> <ul style="list-style-type: none"> <li>• Service Pack 4 or Greater</li> </ul> <p>Citrix MetaFrame XP Presentation Server</p> <ul style="list-style-type: none"> <li>• Feature Release 3</li> </ul>
Microsoft Outlook Integration	<p>Outlook 2000</p> <ul style="list-style-type: none"> <li>• Service Pack 2</li> </ul> <p>Outlook 2002 (XP)</p> <ul style="list-style-type: none"> <li>• Service Pack 2</li> </ul> <p>Outlook 2003</p> <ul style="list-style-type: none"> <li>• Service Pack 2</li> </ul> <p><b>Note:</b> Outlook must already be installed and configured with the user's email information before installing Outlook integration features.</p> <p><b>Note:</b> Outlook 2002 and prior must be configured for workgroup mode (i.e. to support multiple mail service providers) and not for Internet only mode. This must be done before installing Outlook integration features.</p> <p><b>Note:</b> The Collaboration Data Object is required for the Automated CHM changing feature, but is not required for contact import, contact popping, or VM integration.</p>

For ShoreTel 6.1 desktop applications to function correctly, you must install the Client for Microsoft Networking. Refer to the *ShoreTel 6.1 Planning and Installation Guide* for additional information about desktop requirements.