

RELEASE NOTES

**ShoreTel 6
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 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.

Mobility Features

Office Anywhere

Overview

The Office Anywhere feature lets you maintain an on-system extension presence at an external PSTN number (i.e. your cell phone or home analog phone) by creating a mapping between your office phone extension and your cell phone or PSTN phone number, making it appear as though your PSTN phone is part of the ShoreTel system. The feature also lets you manage phone calls via PCM, so while the conversation occurs over the cell phone or home phone, the call appears via PCM and can be acted upon using many of the features available via PCM. (Note that you must be located near a PC that has access to a broadband connection and that is running PCM for this to work.)

The benefits of Office Anywhere include the ability to:

- Use the existing PSTN line for voice while managing the call via PCM over an ordinary broadband Internet connection
- Emulate analog extension hook switch actions via star-star (**) for FLASH and pound-pound (##) for on-hook/off-hook
- Keep your directory number at the office
- Make it appear that you are calling from the office
- Minimize communication costs with flexible IP & trunking requirements
- Retain call management features of the ShoreTel system while maintaining audio quality (without requiring a good IP connection)

Office Anywhere is intended for mobile workers or people who work from home. The feature supports workgroup and contact center agents who are working remotely via a PSTN phone in a manner that is transparent to the workgroup/contact center routing application.

Details:

- Incoming calls to your extension will ring on your cell phone or off-system extension. If you do not answer the call, normal call handling lets the caller leave a message in your ShoreTel mailbox.
- Office Anywhere is fully controllable using PCM, except for answering a call, which must be done manually. The feature will also have limited TUI functionality.
- Calls placed or answered using Office Anywhere will continue to show in the PCM call stack. Normal call control functions such as hold, unhold, conference, transfer, and park will continue to work. Park onto the Office Anywhere extension will not be supported.
- Office Anywhere will function somewhat like an automated “Find Me” feature, except the caller will not have to “press 1 to find me” because the PSTN phone number will be called immediately. There are two ways to cause the call to be answered under both these behaviors: either by clicking “Answer” on the PCM, or by pressing the DTMF digit 1 in response to the repeated prompt. Note that you must answer the call on your PSTN phone manually before doing either of these operations.

Configuration

The system administrator must modify the Class of Service Telephony attributes of the user group to which you belong before you can enable the Office Anywhere feature. Once this has been done, you can configure the Office Anywhere feature on your client machine by following the procedure below:

1. Launch **Personal Call Manager** (PCM) on your client machine.
2. Click on the **File** menu and select **External Assignment**, as shown below.

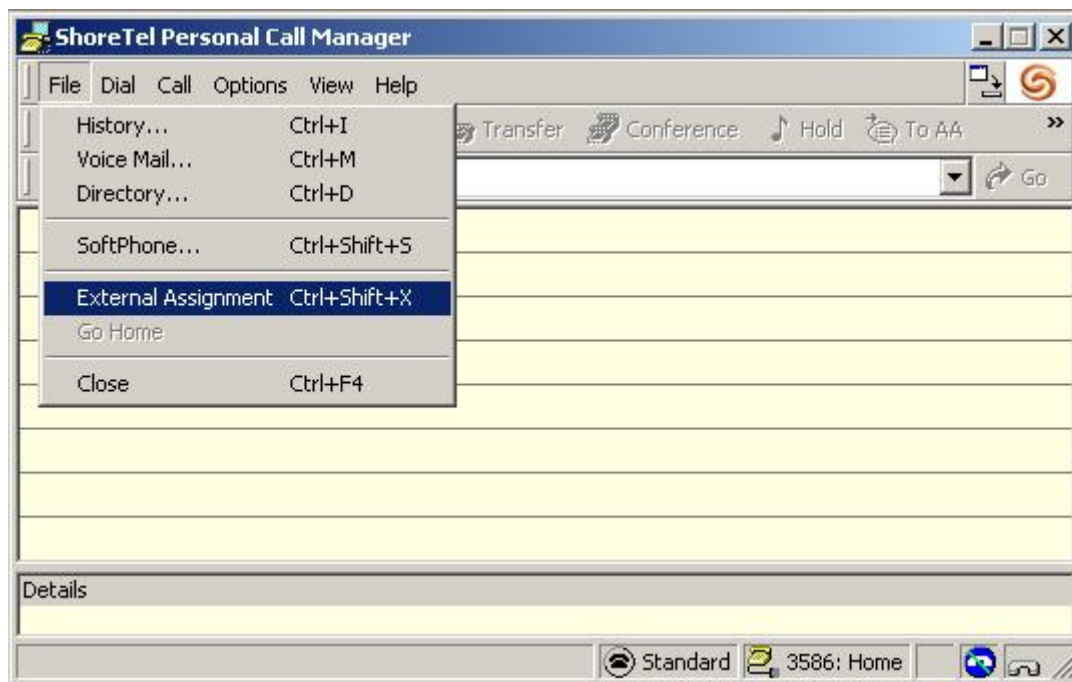


Figure 1 – Using PCM to configure the client machine for Office Anywhere

- When you select **External Assignment**, a pop-up window similar to the one shown below appears.

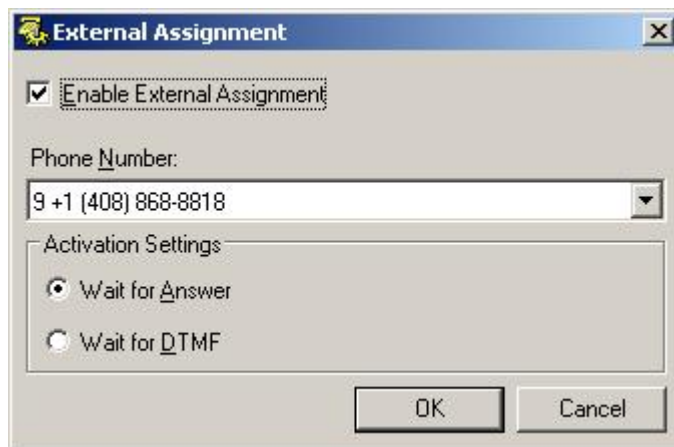


Figure 2 – Select the Enable External Assignment check box

- Select the **Enable External Assignment** check box.
- Click on the **Phone Number** drop-down menu and select the external phone number where your calls will be routed. (This can be your cell phone number, your home number or any other PSTN number that is not within the ShoreTel system.) If the external number has not already been entered, you can do so now.

Note: You cannot configure a PSTN number that would require the call to go out a SIP trunk.
- Select the desired **Activation Settings** radio button. Office Anywhere initiates a dialog at the external number prompting the user to press their keypad "1" to accept the call.
 - Wait for Answer – The calling party will be connected to the Office Anywhere user as soon as he answers his cell or home phone.
 - Wait for DTMF – The calling party will be connected to the Office Anywhere user after the Office Anywhere users hits the appropriate DTMF key.
- Click the **OK** button to store your changes.

8. From PCM, click the **Options** menu and select **Configure Call Handling**.
9. In the *Call Forwarding Condition* area of the window, select the **When No Answer or Busy** radio button (if it has not already been selected).
10. Under the *Call Forwarding Destination* area of the window, click the **Edit Destination** button to display a window similar to the one shown below:

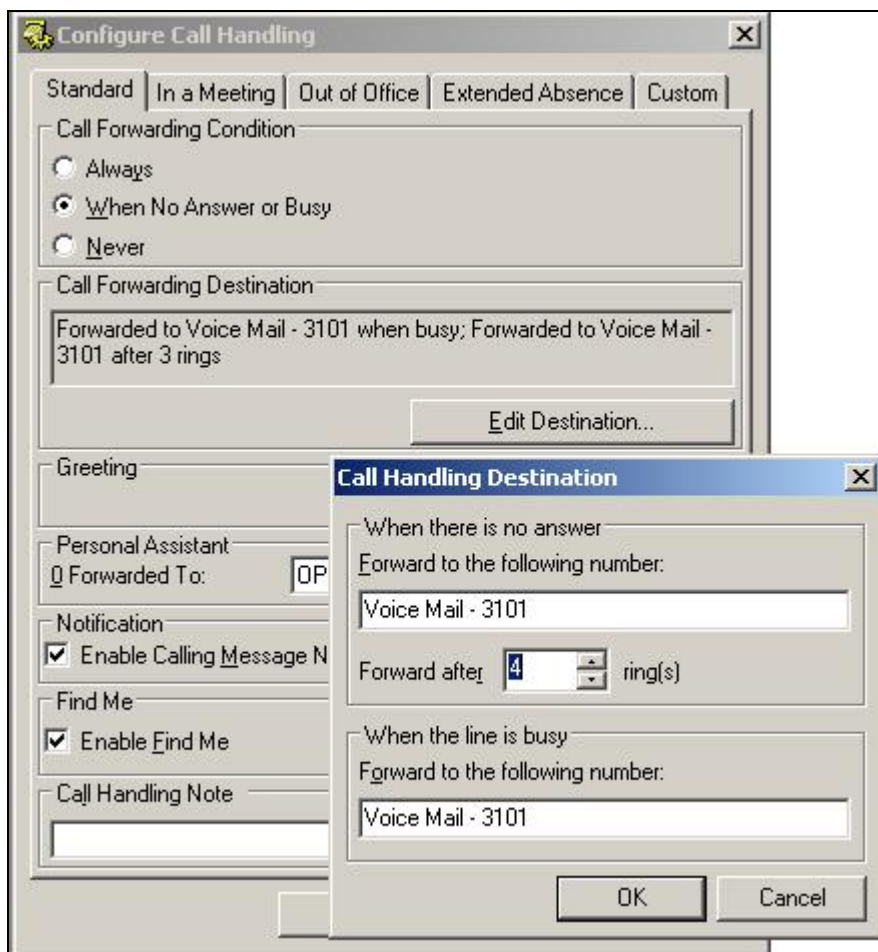


Figure 3 - No Answer Number of Rings

11. In the **Forward after x rings**, select 4 or more rings. (The default, 3 rings, makes it difficult to answer calls before they go to voice mail.)¹
12. Click **OK**.

¹ This parameter can also be set system-wide via the *Call Handling Mode Defaults* link in Director.

When finished, you can verify that Office Anywhere is enabled on your client machine by looking for the cell phone icon at the bottom right corner of the PCM window (as shown in **Error! Reference source not found.**). By hovering over the cell phone icon, a pop-up window should display the phone number that you entered above, indicating that this phone number has been mapped to your office extension.

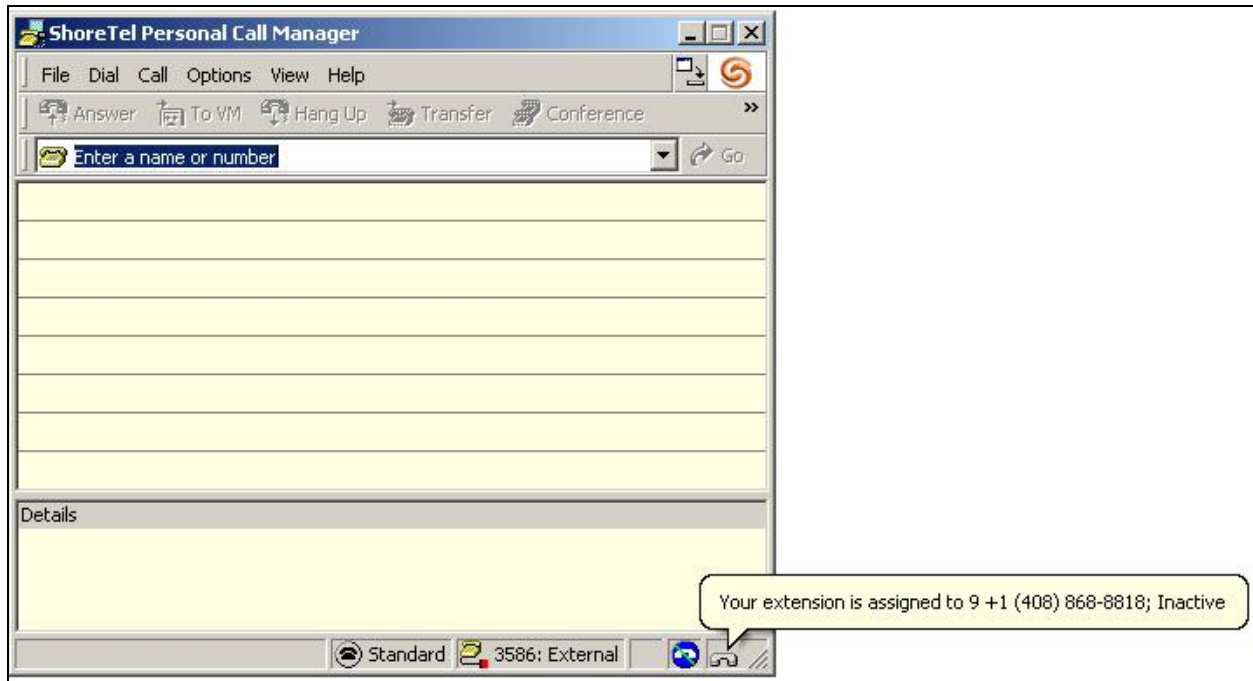


Figure 4 - Verifying proper PCM configuration

System Management and Security

Features

Caller ID Display Control for Extension Monitoring

Overview

The Caller ID Display Control feature is an enhancement to the extension monitoring function. (Extension monitoring is one of the functions you can assign to the custom buttons on your IP 530/560 phone or BB24 device.) Due to the complexity of this feature, we will discuss it separately from the other functions.

Extension monitoring lets you monitor the extension of another user and answer that person's calls if necessary. For example, consider a hypothetical scenario in which there are two administrative assistants working on different floors of the same building. They are both responsible for answering calls from the main phone line, but they cannot see one another. If one is already on a call when another call arrives, the second assistant will see that the first assistant is busy and will know to pick up the incoming call.

However, this ability to peer into the phone activities of other users on the system can present some issues with privacy (e.g. an administrative assistant may be able to see that an executive is receiving calls from an important "hush-hush" sales account). To address such privacy concerns the extension monitoring function has been enhanced to offer control over who can see the caller ID information, (i.e. you can configure the system to prevent the monitoring party from seeing the caller ID information about the person who is calling the monitored party's extension). The monitoring party will only see that the monitored extension is on a call.

Details:

- The custom button will illuminate red (on the monitoring-person's phone) when the person being monitored is on a call. If that call is put on hold and a second call is accepted on the monitored extension, the LED will turn green and will flash twice. Similarly, the LED will flash three times if a third call is accepted.
- This feature can be configured so that the phone of the monitoring party will not ring until the monitored party's phone has rung a specified number of times. This "delayed ring" behavior prevents the monitoring party's phone from ringing while giving the monitored party a chance to answer the call. If the monitored party has not answered the call within the specified number of rings, the monitoring party's phone will begin to ring.
- The custom button (to which extension monitoring has been assigned) can serve dual purposes based on whether the monitoring party is in a call or not. The button can be set to speed dial, intercom, or transfer calls to the monitored extension.
- When the "Show Caller ID Name and Number on Monitored Extensions" Class of Service Telephony setting is not enabled, PCM Extension Monitor (and Agent Monitor) show the number of calls on a user's stack but does not show who they are talking to, and "Properties" is also disabled.

Configuration

Contact your system administrator to enable or disable Caller ID Display controls on your IP 530/560 phone or BB24. These configurations can only be performed via ShoreWare Director.

Silent Client Install

Overview

With this release of the ShoreTel 6 product, the process of upgrading the client software on remote machines has been improved such that administrative rights are no longer needed by the person running the install/upgrade or the client machines. Now your system administrator can easily upgrade the software on your computer regardless of the permissions associated with those machines or the users who log into your PC. Many of the changes are reliant on Microsoft Active Directory, and the configurations must be performed by your system administrator. Additional information on performing a Silent Client Install can be found in the *ShoreTel 6 Server Release Notes*.

Configuration

No configuration is required on your part.

Telephones and User Features

Automatic Off-Hook Preference

Overview

ShoreTel 6 allows you to select which audio path (speakerphone or headset) is automatically activated when you place a call or when you receive a call. This added flexibility is intended for ShoreTel users who rely primarily on their headset for conversations.

In previous releases, headset users would typically press the **Headset** button on the IP phone and then enable **Handsfree Mode** on PCM (to suppress the drone of dial tone). With this release, you can simply set the audio path to **Headset** via PCM, and incoming and outgoing calls will be directed through the headset without you ever having to touch the IP phone. You can control the call activity with PCM.

Another aspect of this new feature is that it provides better notification for incoming calls. In previous releases, when the **Headset** button on an IP phone was enabled, the phone would no longer ring to announce calls. You could see incoming calls announced on PCM or you would have to listen for the subtle call-waiting beep over the headset. But if you removed the headset or stepped away from your desk to talk to a coworker for a moment, you would not hear the call-waiting tone and could easily miss the visual cue on PCM. Thus, it was easy to miss incoming calls.

However, with this release the new behavior provides better notification for incoming calls by generating a call-waiting tone when the default audio pathway is set to **Headset** and the headset is enabled, and by having the IP phone ring at normal volume if the headset is disabled.

Notes:

- The ability to select the audio path will only be supported on the IP530 and IP560 phones.
- The feature can be configured from Director, PCM, or from the IP phone. (Directions are provided below for configuring the feature using each of these methods.)

Configuration

To configure the Automatic Off-Hook Preference feature from PCM, follow the procedure below:

1. Launch PCM.
2. Click on the **Options** menu.
3. Select **Auto Off-Hook Preference**, and then select **Headset**, as shown below:

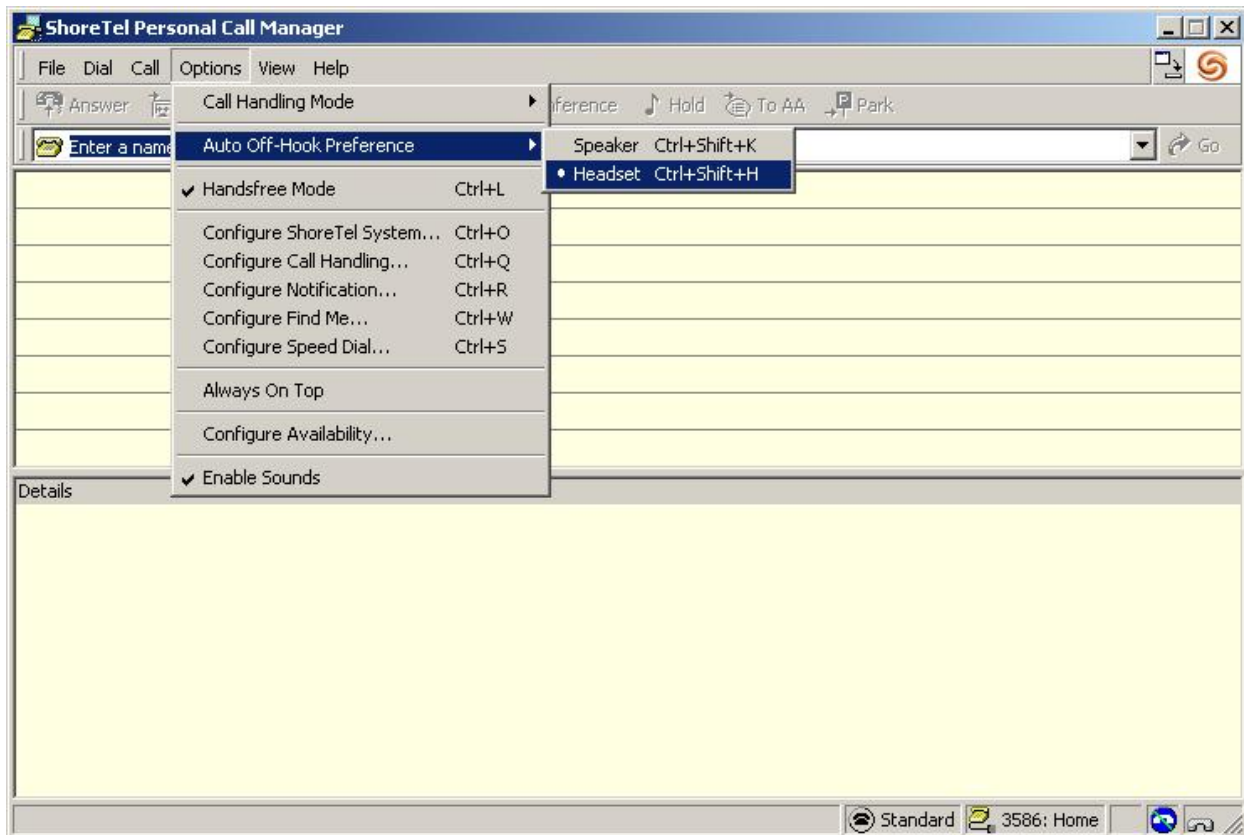


Figure 5 - Selecting Headset as Auto Off-Hook Preference from PCM

To configure the Automatic Off-Hook Preference feature from an IP phone, follow the procedure below:

1. Press the **Options** button on your IP530/560 phone.
2. Enter your password at the prompt and press the **OK** soft key.
3. Use the scroll key to select the second option from the list **2. Def. Audio Path**².
4. Press the **Edit** soft key.
5. Use the scroll key to select **2. Headset** from the list.
6. Press the **OK** soft key.
7. Press the **Done** soft key to save your changes.

² “Handsfree Mode” has been moved from 2nd to 6th in the Options menu; the user must scroll down to reach it now.

InstaDial and Hot Key Pad

Overview

In previous releases, many telephony functions required users to press a soft key after entering a string of digits in order to complete the operation (e.g. transferring or parking a call). ShoreTel 6 eliminates this rather cumbersome requirement with the use of a configurable timeout period. Instead of having to press a soft key to complete a call function, the desired action will occur automatically at the expiration of a configurable timeout period.

The InstaDial feature lets you to transfer a call by pressing the **Transfer** button and entering the destination number (which could be an extension or an external number). Once all of the necessary digits have been entered (which could vary based on the dialing plan for your site), digit collection stops and the timeout period begins counting down. At the end of the countdown, which can be as short as one second, the call is transferred.³

Similarly, the Hot Key Pad feature lets you place a call while the handset is “on-hook” simply by dialing the required number of digits and then waiting for the configurable timeout period to expire. The system administrator must configure the timeout period via ShoreWare Director. There is no configuration required on your part.

Note that configuring this value will affect the behavior of many different features on a system-wide basis. The following features will be affected by this change:

- Conference
- Dialing from the Directory
- Intercom
- On-hook dialing
- Park
- Pickup
- Redial
- Transfer
- UnPark

The timeout period can only be set once for the entire system. You cannot configure different timeout periods for different features or for different users.

Details

- The default behavior for transfers is a consultative transfer.
- Pressing any soft key before the timeout period has expired will cancel the InstaDial behavior.
- Hanging up the phone before the timeout period has expired will expedite the action.
- The feature affects programmed buttons that are configured without a destination as well.
- The following functions are activated when the phone goes off hook:
 - Directory
 - Intercom
 - On-hook dialing
 - Redial

Configuration

All configurations must be performed by the system administrator through ShoreWare Director. The timeout period cannot be configured using PCM or the IP phone interface.

³ Note that this automatic transfer behavior applies only to blind transfers. If a consultative transfer is placed, the call will remain in the call stack until the far end answers.

ShoreTel 24 IP Button Box (BB24)

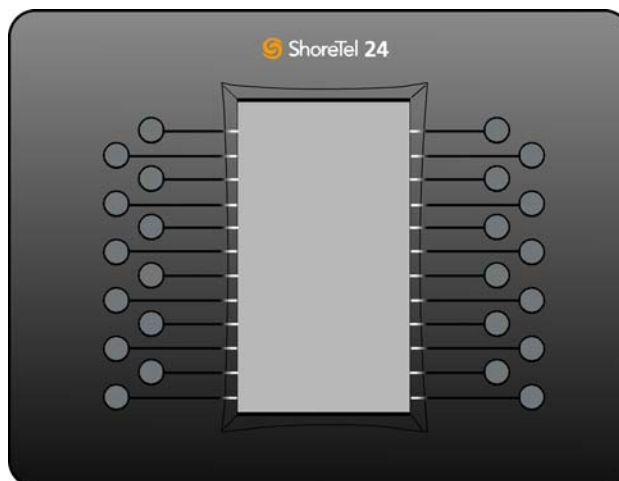
Overview

The new ShoreTel 24 IP Button Box provides additional shortcut functions for users of the IP530 and IP560 phones. The BB24 behaves like an additional set of 24 custom keys in addition to the 3 on the IP530 or 6 on the IP560.

- For detailed information on available options and how to use them, refer to the *ShoreTel 24 IP Button Box User Interface Guide*.
- For installation instructions, refer to the *ShoreTel 24 IP Button Box Quick Install Guide* (included with every BB24).

Features:

- Each Button Box has 24 custom keys
- 4 Button Boxes may be assigned to an IP530/IP560 phone.
- Takes advantage of the "Programmable Buttons" feature, new in this release.
- Each user may define layouts for up to four BB24's thus allowing a user to have a maximum of 98 (if IP530) or 101 (if IP560) programmable buttons.
- Each "button" is an LED-enabled hard key and has an associated 6 character label on the LCD.
- Ethernet switch port allows connection of a PC to the back of the button box.



ShoreTel IP Phone (IP 110)

Overview

The new IP phone extends the range of available ShoreTel IP Phone choices from basic features to enhanced features.

- For detailed information on available options and how to use them, read the *ShoreTel 110 IP Phone Telephone User Interface Guide*.
- For installation instructions refer to the *ShoreTel 110 IP Phone Quick Install Guide* (included with every phone).
- Refer to the *ShoreTel 6 Planning and Installation Guide* for information regarding assigning network parameters to the phones.

Features:

- IP110 – General User
- Cost effective telephone targeted at the masses
- 1 line appearance
- 6 function keys (Conference, Hold, Intercom, Redial, Transfer, Voice Mail)
- Ethernet Switch port allows connection of a PC to the back of the phone. Alternatively, the phone can be powered by connecting it to the Ethernet port on a ShorePhone 24 IP Button Box.



Programmable Buttons

Overview

ShoreTel 6 allows you to change the functions associated with the custom buttons on some IP phones and on the button box. You can create shortcuts for operations that would normally require pressing two or three buttons to accomplish the same task.



For example, the action associated with the bottom button on an IP 530/560 could be configured to speed-dial a particular extension or external number. The button above that could be set to perform over-head paging, and so on. All of the custom buttons are configurable except for the top-most button, which is permanently set to provide call appearance information (i.e. ringing indicator and call timer information).⁴

You can evaluate which actions you perform on a regular basis and then associate those actions with the custom buttons so that instead of having to dial a star code (such as *14 for picking up the Night Bell), you can just press one button. See the table on the following page for supported functions.

Details:

- After a function is assigned to a button, you can enter a label (up to five characters on the IP 530/560 and up to six characters on the IP 100 and BB24). The label appears on the LED display next to the custom button.
- The programmable button feature is supported on the IP 100 and IP 530/560 models but is not supported on the analog models or on the IP 110 or IP 210 models.
- If your phone is an IP100, the system administrator can configure the custom buttons on your phone via ShoreWare Director. This particular model cannot be configured via the telephone interface and must be configured via Director. For all other phones that support custom buttons, the administrator must enable permissions for you (and for any other end users) before you can modify the custom buttons on your IP phone via the telephone interface.
- The IP100 does not have custom buttons, but the soft keys can be configured (via ShoreWare Director) in the same way that custom buttons are configured on the other phones.

⁴ This is true for IP 530/560 phones, but the new BB24 button box does not support call appearance.

Supported Functions:

Function	Parameter	Comments
Barge In	Extension or none	
Call Appearance	None	Not supported on Button Box
Conference Blind	Extension or external number	
Conference Consultative	Extension or external number	
Conference Intercom	Extension or none	
Dial Mailbox	Extension or none	
Dial Number (Speed Dial)	Extension or external number	
Intercom	Extension	
Monitor Extension	Extension	
Page	None	
Park	Extension or none	
Park and Page	Extension or none	
Pickup	Extension or none	
Pickup Night Bell	None	
Pickup/Unpark	Extension or none	Uses internal presence to determine which operation to perform
Record Call	None	Operates on selected call in connected; Pressing a second time stops the recording
Record Extension	Extension	
Send Digits Over Call	Extension	
Silent Monitor	Extension or none	
Transfer Blind	Extension or external number	
Transfer Consultative	Extension or external number	
Transfer Intercom	Extension or none	
Transfer to Mailbox	Extension or none	
Transfer Whisper	Extension or none	
Unpark	Extension or none	
Whisper Page	Extension or none	
Whisper Page Mute	None	

Configuration

Note that before you can program the custom buttons on your phone, the administrator must first enable you to do so. Contact your system administrator to find out whether you have permissions to configure the programmable buttons.

To change the custom buttons on your IP 530/560 phone or BB24⁵ via the telephone interface, follow the procedure below:

1. Press the **Options** button on your IP phone and enter your password, followed by the **#** key.
2. Scroll through the list to option **4. Program Buttons**.
3. Press the **Edit** soft key.
4. Press the custom button that you would like to modify. (If you are modifying the buttons on the BB24 device via the 530/560 interface, press the button on the BB24 that you would like to configure.)
5. Scroll through the list of functions until you find the function that you would like to apply to this button.
6. When you have highlighted the appropriate function, press the **Next** soft key.
7. Enter an extension, external number, or leave it blank. Then, press the **Next** soft key.
8. Press the **1 -> Aa** soft key to shift the key pad to alphabet mode.
9. Use the key pad to enter a short descriptive word that will remind you of the new function of the custom button.

⁵ The BB24 device is attached to an IP 530/560 and must be configured through the phone's interface. You cannot configure the BB24 through the device's own interface.

10. Press the **Done** soft key.
11. Press the **Done** soft key again to store your changes.

Enhancements

Enhanced Dial Tone Behavior

Overview

The IP phone now goes on-hook when the far end hangs up. No configurations are necessary.

LIFO Voice Mail Heard Queue

Overview

After listening to voice messages, the heard queue plays back in last in, first out order. No configurations are necessary.

System Requirements

Required Desktop PC Configurations

Operating Systems	<p>Windows XP – Professional</p> <ul style="list-style-type: none"> • Service Pack 1 and 2 • Themes Supported <p>Windows 2000 Professional</p> <ul style="list-style-type: none"> • Service Pack 4 or Greater <p>Windows 2000 Terminal Server</p> <ul style="list-style-type: none"> • Service Pack 4 or Greater <p>Citrix MetaFrame XP Presentation Server</p> <ul style="list-style-type: none"> • Feature Release 3
Microsoft Outlook Integration	<p>Outlook 2000</p> <ul style="list-style-type: none"> • Service Pack 2 <p>Outlook 2002 (XP)</p> <ul style="list-style-type: none"> • Service Pack 2 <p>Outlook 2003</p> <ul style="list-style-type: none"> • Service Pack 2 <p>Note: Outlook must already be installed and configured with the user's email information before installing Outlook integration features.</p> <p>Note: 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>Note: 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 desktop applications to function correctly, you must install the Client for Microsoft Networking. Refer to the *ShoreTel 6 Planning and Installation Guide* for additional information about desktop requirements.