



## **ShoreTel 7.5**

# **ShoreWare® Call Manager Release Notes**

*Date: 4 October 2007*

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# IP 115 Single Line Speakerphone

## Synopsis

The ShoreTel IP 115 Telephone is a cost-effective alternative that provides one call appearance and basic phone features, including full speakerphone functionality.

## Background

The IP 110 was introduced in 2006 as ShoreTel's entry level IP phone. The IP 115 is based on the IP 110 phone, with the primary difference of the addition of an external microphone to the IP 115 to support full speakerphone functionality.

## Description

For detailed information on using the IP 115 Telephone, refer to the ShoreTel IP 115 Telephone User Interface Guide. The following list describes the operational differences between the IP 115 and IP110:

- **External Microphone:** The IP 115 includes an omni-directional microphone, in addition to the microphone provided on the handset, to support the speakerphone function.
- **Speaker usage:** The external speaker on the IP 110 is used to alert the user of an incoming call, and for playing paging announcements and intercom calls. In addition to these functions, the IP 115 uses the speaker for playing the inbound audio stream during a phone conversation when the speakerphone function is invoked.
- **Speakerphone Button and LED:** The IP 115 includes a button that invokes the speakerphone function. The button LED is green when the speakerphone function is active.
- **Redial and Intercom usage:** Redial and Intercom functions are invoked on the IP 110 when the handset is off hook. These features can be initiated on the IP 115 by pressing the respective buttons without taking the handset off hook. This routes the audio stream through the external microphone and speaker.
- **Rate switching:** The IP 110 provides full 100 Mbit performance. Ethernet packet switching is performed in software on the IP 115; the speed during file transfers is 10 Mbps for small packets and 100 Mbps for large packets.

Figure 1 displays the IP 115 phone.

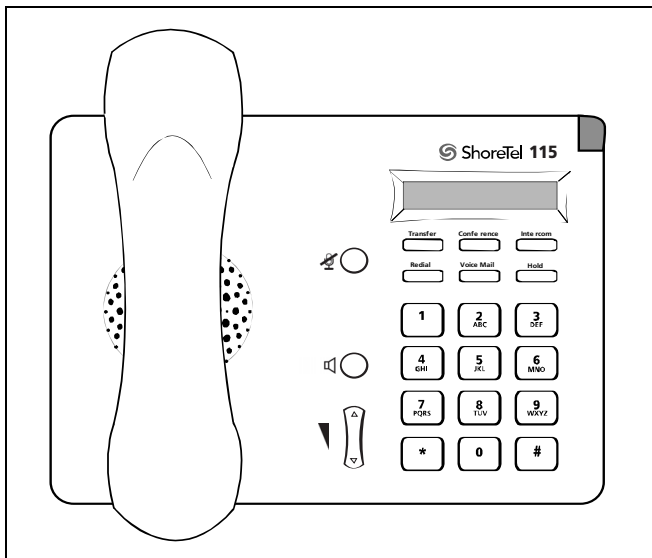


Figure 1 IP 115 Telephone

# IP 265 Telephone

## Synopsis

The ShoreTel IP 265 telephone is a mid-range phone that, in addition to most basic functions, features an LCD color display.

## Background

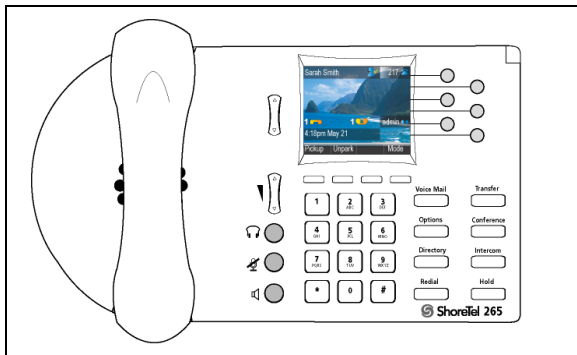
The ShoreTel IP 265 feature set is based on the IP 230. ShoreTel IP 265 enhancements include:

- Six tri-color (red, orange, green) programmable buttons. (Note that the IP230 provides three single-color programmable buttons.)
- A 2.7 inch color TFT LCD display with backlighting.

## Description

The ShoreTel IP 265 phone, shown in Figure 2, provides the following features:

- Six call appearance buttons with integrated tri-color LEDs.  
Buttons can be programmed for extension monitoring, speed dial, and other functions. The top button is reserved for activating a call appearance.
- 2.7 inch color TFT LCD color display, 320 x 240 pixels  
The LCD is capable of displaying a 24-bit RGB bitmap file and offers a backlit display.
- Eight dedicated feature buttons (Voice Mail, Transfer, Options, Conference, Directory, Intercom, Redial, and Hold)
- Ethernet switch port for connecting a PC to the phone's network.



**Figure 2** ShoreTel IP 265 Phone

For usage instructions and information on available options, refer to the ShoreTel 265 IP Phone User Interface Guide.

For installation instructions, refer to the ShoreTel 265 IP Phone Quick Install Guide.

# ShoreWare® Mobile Call Manager

## Introduction

ShoreWare Mobile Call Manager (MCM) enables a mobile device to function as a ShoreWare extension and provides an interface, similar to Call Manager, for accessing ShoreWare client information. In addition to initiating calls from the Call History, Voice Mail, and QuickDialer screens, end users can access their voice mail, configure call handling mode settings, set the active call handling mode, configure Office Anywhere settings, and activate Office Anywhere from the MCM user interface.

The **Mobile Call Manager (MCM)** client application is installed on each mobile device. The MCM accesses ShoreWare functions, configuration information, voicemail, and calling history by communicating with the MCMS (a software component located on the main and distributed ShoreWare servers).

Secure wireless communication sessions with specified mobile devices are conducted through a Reverse Proxy Server or a Blackberry Enterprise Server.

Mobile devices receive *MCM Client Installation Files* from the ShoreWare Server through a Blackberry Enterprise Server. After these files have been installed on the device, the end user can configure the mobile device to access the ShoreWare server through an IP address (which is provided by the system administrator).

## Requirements

### ***MCM Support – Languages***

MCM is currently supported in English only. There is no support for other languages, nor for extended character sets. The MCM application can be used outside the United States in countries that do not predominantly speak English, but all MCM text will appear in English (regardless of the language of the BlackBerry operating system).

### ***MCM Support – Carriers***

MCM is supported on carriers that allow installation of third-party applications onto the BlackBerry device.

### ***MCM Support – Devices***

MCM is supported on the following devices:

- BlackBerry 8700
- Blackberry 7290

### ***MCM Client Installation Files***

MCM Client Installation Files are a set of files that enable the MCM client application to run on mobile devices. Clients download these files to their mobile devices from a server.

These files are originally placed on the ShoreWare Server as part of the ShoreWare installation. Then they are moved by the system administrator to a server that can be accessed by the mobile devices of system end users.

Installing the ShoreWare Server places the MCM Client Installation files directly on the ShoreWare Server. BlackBerry devices can access the files directly from the ShoreWare Server if the network includes a BES.

## Client Configuration

ShoreWare Mobile Call Manager client software is installed on the mobile device and is then configured to communicate with the Mobile Call Manager Server.

## Downloading Files

To install the MCM client software on a mobile device:

1. Open a browser on the mobile device.
2. Enter the IP address or URL of the server that downloads MCM Client Installation Files.  
The administrator must provide this address to the client.
3. Click the **Go** button.

## Logging onto MCM

After installing the MCM client application on the mobile device, the end user accesses MCM from the Application menu by selecting the ShoreTel icon. The client's voicemail PIN is used as the Mobile Call Manager's PIN.

The Side Convenience Key on the BlackBerry 8700 can be programmed to open MCM.

### **Initial MCM Access**

The first time a client opens MCM after installing the program, the device prompts for the following information:

- The IP address of the server through which the mobile device can access the MCMS
- The port number of the server through which the mobile device can access the MCMS
- The client's extension
- The client's PIN

When MCM is properly configured, the device displays the "Welcome to the MCM Application" panel. Press the scroll button, then click **Next** to display the Main Menu.

### **Integrating Address Book Contacts**

When a BlackBerry logs into MCM, the device provides an option that allows the user to include contacts stored locally on the BlackBerry when performing QuickDialer operations. The opening panel lists the following question: "*The application Mobile Call Manager has attempted to read your user data. Would you like to allow this?*", followed by **Yes** and **No** options.

- **If the user clicks Yes**, all QuickDialer queries will return appropriate entries from the user's ShoreWare address book and the BlackBerry address book.
- **If the user clicks No**, all QuickDialer queries will return appropriate entries only from the user's ShoreWare address book.

When the user selects **Yes**, MCM loads the BlackBerry contact information, where it is accessed through QuickDialer operations. Large BlackBerry address books may take several seconds to load; when the user attempts to use QuickDialer before the BlackBerry contact information is loaded, the query will return entries from only the ShoreWare address book.

The BlackBerry 8700 can execute MCM in the background while actively performing other tasks. Running MCM in the background while actively running another program maintains the BlackBerry contact information in MCM memory. Pressing the End button returns the BlackBerry display to the menu panel while running MCM in the background.

### **Version Control**

When a client logs into MCM, the server compares the client and server MCM versions to verify that they are compatible. MCM defines three compatibility levels:

- **Current** – The MCM client and server are running the same version. The client MCM runs with no problems.
- **Compatible** – The MCM client and server are running different, compatible software versions. The client receives a message that, while an upgrade is recommended, the client can continue using the application.

- **Incompatible** – The MCM client and server are running different, incompatible software versions. The client must update the software before running MCM.

### **Resetting Client Information**

Resetting the MCM configuration removes the client's information from the mobile device. After resetting the MCM configuration, a client must perform the initial MCM access procedure listed in **Initial MCM Access** to access MCM features on the device.

Configuration information in the mobile device persists when the device is turned off. When the device is subsequently powered up, the application does not require reentry of the end user's extension and password to access MCM features, account settings, and the end user's information.

### **Configuration Options**

The Settings panel, accessed by selecting Settings from the Main Menu, provides the device configuration and account parameter setting options:

- **Call Handling Modes:** This menu sets parameter values for the client's call handling modes.
- **Office Anywhere:** This menu specifies the *Office Anywhere* external number.
- **Default Start Page:** This menu specifies the initial panel displayed by the device when the end user opens MCM.
- **Network Speed:** This menu determines the amount of data the mobile device retrieves in one transmission when the end user requests a QuickDialer, Voicemail, or Call History update. When this parameter is set to slower speeds, the device receives less information to minimize the time the client waits for the update:
  - **Low (Slow 2/2.5G/CDMA)** – device receives 10 entries from server
  - **Medium (Fast 3G)** – device receives 25 entries from server
  - **High (High Speed/Wi-Fi)** – device receives 100 entries from serverUsers can request more entries by selecting Update on the appropriate menu.
- **Reset:** This option removes the client MCM information from the device.

## **Using the Device**

### **Main Menu**

The Main Menu displays client status and provides links for navigating to Voicemail, Call History, QuickDialer, and Configuration panels.

MCM displays the following status information at the top of the Main Menu:

- Number of unheard voice message in the client's mailbox
- Number of missed calls
- Office Anywhere activity setting

MCM displays the active call handling mode at the bottom of the Main Menu.

### **Making Calls Through Mobile Call Manager: Setting Office Anywhere**

The MCM program operates separately from the mobile device's normal calling mechanism. When MCM is active, the device maintains its ability to send and receive calls independent of MCM.

When **Office Anywhere** is set to **Home Assignment**, calls initiated through MCM on the mobile device are completed through the ShoreTel IP phone that the system associates with your extension. To route ShoreWare extension calls through the mobile device, **Office Anywhere** must be set to **External Assignment**, with the **External Number** set to that of the mobile device.

To change the Office Anywhere setting to *External Assignment*:

- Navigate to the **Main Menu**, press the scroll button and select *Set Office Anywhere*

To change the Office Anywhere parameters:

- Access the **Office Anywhere** panel by selecting *Settings -> Office Anywhere* from the **Main Menu**.

### **QuickDialer**

QuickDialer is a tool that displays contact information and initiates phone calls without requiring entry of the complete contact name or number.

#### **Phone Number Retrieval**

An end user performs a QuickDialer retrieval by entering a set of alphanumeric characters, then initiating an update. The device responds by displaying entries whose First Name, Last Name, extension number, or external contact number match the entered characters. The number of entries that the device initially receives depends on the **Network Speed** setting.

To retrieve additional, available entries:

- Press the cursor button and select *Update*

#### **Calling a Retrieved Number**

To initiate a call:

- Scroll to the desired number, press in the right scroll button and click the *Call* soft button

#### **Phone Number Directory Scope**

- QuickDialer merges the client's mobile device directory with the ShoreTel system directory when providing an entry list.

Microsoft Outlook contacts accessible through the client's desktop application are not included in an MCM retrieval.

### **Voicemail**

The Voicemail message list displays the client's mailbox contents and the following information for each message:

- Folder (Inbox and Unheard, Inbox and Heard, Saved)
- Caller ID (name and number, if available)
- Time of receipt
- Duration
- Heard status

The list displays a voicemail icon with each message. A grey icon indicates that the message has been heard. A normal icon indicates an unheard message.

The messages are listed in the order they are received, with the most recent message on top. The ShoreWare Mobile Call Manager checks the voicemail server for new messages and updates the list displayed on the client's handset. The number of entries that the device initially receives depends on the **Network Speed** setting.

To retrieve additional, available entries:

- Press the cursor button and select *Update*

The following actions are available for the selected message:

- **Play Preview:** This action plays the first few seconds of the message on the mobile device.<sup>1</sup>

Previewing a message does not change the heard status of the message.

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1. Note that this functionality is not supported on the BlackBerry 7290.

- **Play:** This action plays the message on the mobile device or the device assigned to the extension.
- **Call Sender:** This action initiates a call to the address from where the message was sent.  
This action is available only from messages that are associated with a valid Caller ID.
- **Delete:** This action moves the message to the Deleted Items folder of the client's mailbox.  
Messages in the Deleted folder can be recovered to the folder from where they were removed. To permanently remove a message, delete it from the Deleted folder.

### **Call History**

This call history screen displays the ten most recently received calls by the extension, with the most recent call listed first. The display sorts the received calls, dialed calls, and missed calls into separate lists.

Each entry provides the following parameters about the corresponding call:

- Caller ID (name and number, if both are available)
- Time of Call
- Duration of Call
- Caller Name (if Available)

To dial the contact specified by a call history entry:

- Select the desired call and click the **Call** soft button.

### **Call Handling Mode operations**

You can change all call handling mode parameters and set the active call handling mode from MCM.

To configure a call handling mode:

- Select **Settings -> Call Handling Modes** from the **Main Menu**.

To set the active call handling mode:

- Navigate to the **Main Menu**, press the scroll button, and select **Set Call Handling Mode**.

# Voicemail Password Aging

## Synopsis

The Voicemail Password Aging feature configures TUI passwords with the ability to expire after a specified period. When a system administrator enables password aging, the system prompts and requires each ShoreWare client to change their TUI password after a specified period from the time that the password was most recently changed.

## Background

Previous ShoreWare versions do not force users to change their TUI passwords after the initial login. Requiring periodic password changes increases the security of the system.

## Description

The Password Aging feature applies to the following Dialed Number types:

- User extensions
- Workgroup extensions
- Route point extensions.
- External user extensions

Passwords are associated with two timing parameters: Warning and Expiration

- **Warning** specifies the number of days, measured from the last password change, after which the system begins prompting clients to change their passwords.
- **Expiration** specifies the number of days, measured from the last password change, after which clients are required to change their passwords before they can access voicemail.

When the Warning and Expiration periods have not elapsed, clients do not receive any prompts to change their passwords. When the Warning period has elapsed, clients receive prompts to change their passwords but are allowed to access their voicemail if the Expiration period has not elapsed. After the Expiration period elapses, clients are required to change their passwords before they can access voicemail.

Clients are not permitted to use their current password as their proposed new password; the system prompts them to enter a different password. The system allows clients to exit the Password Change dialog panel without changing their passwords.

## Implementation

Voicemail Password Aging is configured by the system administrator. There are no client voicemail aging configuration options.

When an end user attempts to access voicemail after a warning or expiration period elapses, ShoreWare prompts the user through the changing password process by playing audio messages.

# Record Enhancements (Selectable Mailboxes)

## Synopsis

This feature enhancement allows the automatic placement of recorded calls into mailboxes other than that of the client that initiated the call recording.

## Background

IP Phones and Call Manager buttons can be programmed to record calls. In previous ShoreWare versions, Director could designate, for each end user, only one destination mailbox for all recordings initiated by that user. Although multiple buttons could be programmed on a user's phone or PCM toolbar, all calls initiated by the user were placed in the same voice mailbox.

The Selectable Mailboxes feature permits the designation of a voice mailbox with each button programmed to record calls. Each button that initiates a call recording is associated with a voice mailbox. Each call recording mailbox assignment is independent of all other assignments.

This feature is available for *Record Call* (end users recording their own calls) and *Record Extension* (end users recording calls from other extensions) functions.

## Description

### Call Recording Prerequisites

End users must belong to a Telephony Class of Service that allows the *Recording of Own Calls* (Record Call function) or *Record Other's Calls* (Record Extension function).

### Configuring IP Phone Buttons

#### *Using Selectable Mailboxes from IP Phones*

Clients initiate call recordings from a programmable button on their IP phones or from a Call Manager toolbar. Buttons that are programmed to record a client's calls also specify the mailbox that will receive the recording. Buttons that are programmed to record calls involving another client specify the client's whose calls will be recorded and the mailbox that will receive the recording.

**Example:** Adam has an IP 560 phone. Button 2 on the phone is programmed to record his calls and store the recordings in Bonnie's voice mail box. Adam can press Button 2 while on a call to start the recording. When he goes on hook or presses Button 2 again, the system stops recording the call and places the recording in Bonnie Hopkins mailbox.

**Example:** Button 3 on Adam's phone is programmed to record Evan's calls and place the recordings in Adam's mailbox. When Evan goes off hook and acquires a dial tone, Button 3 on Adam's phone turns red. Adam can start recording Evan's call by pressing Button 3. At the conclusion of the call, or when Adam presses Button 3 the second time, the recording is placed in Adam's mailbox.

#### *Configuring Selectable Mailboxes*

End users authorized to program their IP phone buttons can configure the recipient mailbox for **Record Call** and **Record Extension** functions. PCM toolbar buttons can only be programmed by a system administrator.

To program an IP Phone Button for the Selectable Mailbox function:

1. Access the **Options** panel by pressing the *Options* button and entering your password.
2. Select **Program Buttons** from the **Options** Menu and press the *Edit* button.
3. Press the button to be programmed.

4. Scroll down to **Record Call** or **Record Extension**, then press *Next*.
5. Proceed normally through command prompts until the panel displays *Please enter a mailbox for the recording to land or leave it blank*.
6. When the phone displays *Please enter a mailbox for the recording to land or leave it blank*, enter the extension of the mailbox that is to receive the recordings.  
  
If this option is left blank, recordings are placed in the initiator's mailbox.
7. Finish the configuration procedure for the specified function.

## Configuring PCM Toolbar Buttons

Selectable mailboxes can be configured on PCM toolbar buttons from ShoreWare Director

When a selectable mailbox field on a PCM Toolbar button does not specify a recipient mailbox, the default entry is specified in Director by the **Voice Mailbox for Recorded Calls** setting on the **Edit User Personal Options** panel.

Refer to the Server Release Notes for more information.

# System Requirements

## Required Desktop PC Configurations

### Operating Systems

- Windows XP - Professional
  - Service Pack 2
- Windows Vista Business Edition
- Windows 2003 Terminal Server
  - SP1, SP2
- Windows 2003 R2 Terminal Server
- Citrix MetaFrame Presentation Server 4.0

**Note:** All Operating Systems are for 32-bit. There is no support for 64-bit in this release.

### Microsoft Outlook Integration

- Outlook 2007 (see details regarding CDO library on following page)
- Outlook 2003
  - Service Pack 2
- Outlook 2002 (XP)
  - Service Pack 2

**Note:** Outlook must already be installed and configured with the user's email information before installing Outlook integration features.

**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.

**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.

For ShoreTel 7.5 desktop applications to function correctly, you must install the Client for Microsoft Networking. Refer to the *ShoreTel 7.5 Planning and Installation Guide* for additional information about desktop requirements.

### **Windows 2000 no longer supported**

ShoreTel has supported the Windows 2000 operating system for several years. As Microsoft is transitioning the product from the Mainstream Support to the Extended Support phase, ShoreTel will no longer be supporting this operating system.

**ShoreTel 7.5 will not run on the Windows 2000 OS.**

### **Microsoft Internet Explorer 7**

Internet Explorer 7.0 has been fully tested for compatibility with ShoreWare Director, the ShoreWare Softphone, and the ShoreWare Web Call Handling Mode Client. ShoreTel supports Internet Explorer starting with ShoreTel 6.1 (GA build 11.14.5506.0) and beyond for these clients.

ShoreWare Converged Conferencing will support Internet Explorer 7.0 by the 7.1 release of the ShoreTel Converged Conferencing solution. This is estimated to be available in the second half of 2007.

### **Windows Vista Business Edition Operating System**

ShoreTel supports the 32-bit version of Microsoft Vista Business Edition beginning with ShoreTel 7. The following ShoreTel clients will be fully supported on Vista with ShoreTel 7.5:

- ShoreTel Personal Call Manager
- ShoreWare Softphone

The release date for the use of the ShoreWare Contact Center Agent Toolbar, ShoreWare Agent Manager, ShoreWare Historical Reports, and the ShoreWare Contact Center Director on Windows Vista Business Edition has not been determined at this time and will be announced separately.

As Vista Business Edition is a desktop operating system, support for the ShoreWare Server on the Windows Vista Business Edition operating system is not planned at this time.

**WARNING:** If ShoreTel 7.5 PCM has already been installed on a client machine, the system administrator must run a TAPI repair executable on that client machine if/when the operating system on that machine is upgraded from Microsoft Windows XP to Microsoft Windows Vista Business Edition. Please refer to the "System Requirements" section of the Server Release Notes for details.

### **Microsoft Outlook 2007 and PCM Integration**

ShoreTel 7.5 now supports Microsoft® Outlook 2007. However, the Collaboration Data Objects (CDO) library shipped with prior releases (e.g. MS Outlook 2002 and 2003) is not included in Outlook 2007. (This CDO library allowed users to access Outlook objects, in addition to allowing users to access the contents of mailboxes and public folders.) As CDO is a prerequisite for the ShoreWare and Outlook integration and is required for use of the ShoreTel Calendar Form in Call Manager, the CDO library must be installed separately.

**Note that MS Outlook 2007 must be installed prior to installing the CDO library.** Installation instructions and the downloadable CDO file can be found at the following URL:

<http://www.microsoft.com/downloads/details.aspx?familyid=2714320D-C997-4DE1-986F-24F081725D36&displaylang=en>

Please check with Microsoft for any updates to the contents at this URL.

### **Supplemental Documentation**

For additional information, refer to <http://www.ShoreTel.com>