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Preface

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

Objectives of this Book

This guide explains how to install, configure, administer, and maintain the ShoreTel Connect client.

Organization

This guide includes the following sections.

Table 1: User Guide Contents

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chapter 1, Installing and Launching the ShoreTel Connect Client</td>
<td>Describes the procedures for installing and launching the ShoreTel Connect client.</td>
</tr>
<tr>
<td>Chapter 2, Using the ShoreTel Connect Client</td>
<td>Describes the process of signing in and navigating through the ShoreTel Connect client.</td>
</tr>
<tr>
<td>Chapter 3, Managing Contacts</td>
<td>Describes procedures for managing contacts on the ShoreTel Connect client.</td>
</tr>
<tr>
<td>Chapter 4, Managing Availability States</td>
<td>Describes the availability icons and the process of changing the availability status on the ShoreTel Connect client.</td>
</tr>
<tr>
<td>Chapter 5, Managing Phones</td>
<td>Describes the process of using a desk phone with the ShoreTel Connect client.</td>
</tr>
<tr>
<td>Chapter 6, Managing Calls</td>
<td>Describes procedures for handling calls, managing call options, routing calls and handling voicemail messages.</td>
</tr>
<tr>
<td>Chapter 7, Managing Instant Messaging</td>
<td>Describes procedures for handling instant messaging on the ShoreTel Connect client.</td>
</tr>
</tbody>
</table>
Table 1: User Guide Contents

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chapter 8, Integrating with Microsoft Exchange</td>
<td>Describes the process of integrating the ShoreTel Connect client with Microsoft Exchange.</td>
</tr>
<tr>
<td>Chapter 9, Managing Conferences</td>
<td>Describes procedures for creating, viewing, recording, and canceling conferences using the ShoreTel Connect client.</td>
</tr>
<tr>
<td>Chapter 10, Conferencing Using ShoreTel Connect Client for Web</td>
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</tr>
<tr>
<td>Chapter 11, Sharing Screens with a Contact</td>
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</tr>
<tr>
<td>Chapter 12, Managing your Account</td>
<td>Describes procedures for managing your user account on the ShoreTel Connect client.</td>
</tr>
<tr>
<td>Chapter 13, Managing Workgroups</td>
<td>Describes information about managing workgroups using the ShoreTel Connect client.</td>
</tr>
</tbody>
</table>

Conventions

This guide uses the following advisory notices:

Note

This information is extra, or supplementary.

The following typographical marking conventions are used in this document.

<table>
<thead>
<tr>
<th>Marking</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bold</strong></td>
<td>Names of interface objects, such as buttons and menus.</td>
</tr>
</tbody>
</table>
| **Blue** | Cross references with hyperlinks. Click the blue text to go to the indicated section. All chapters have a list of section links on the first page.  
**Note:** Table of Contents entries are also links, but they are not shown in blue. |
Installing and Launching the ShoreTel Connect Client

This chapter provides information on how to install the ShoreTel Connect client.

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Overview

The ShoreTel Connect client presents a single interface to manage business communications using a ShoreTel desk phone, computer, or mobile phone. With support for Microsoft Windows, Macintosh (OS X), and Collaboration for Web, the ShoreTel Connect client simplifies your day-to-day communications and streamlines your work.

Operating System

- Microsoft Windows
  - Microsoft Windows 7 SP1
  - Microsoft Windows 8
  - Microsoft Windows 8.1
  - Microsoft Windows 10
- Macintosh OS X
  - Apple OS X 10.10
  - Apple OS X 10.11

Supported Servers

- Microsoft Exchange 2010
- Microsoft Exchange 2013
- Microsoft Exchange 2016

Installing the ShoreTel Connect Client on Windows OS

**Note**

Before installing the ShoreTel Connect client, uninstall any versions of ShoreTel Communicator on your computer.

1. Do one of the following:
   - Open the e-mail notification from your ShoreTel administrator that describes how to install the ShoreTel Connect client, and click the link to install the client.
   - In a browser, enter `<FQDN>/shorewareResources/ClientInstall`, where FQDN is your company's fully qualified domain name, click the ShoreTel Connect client, and click Next.
2. On the **License Agreement** page, select **I accept the terms in the license agreement**, and click **Next**.

3. Click **Next** to install the client in the default folder, or click **Change** to change the destination folder and continue.

4. On the **Ready to Install the Program** page, click **Install**.

5. On the **InstallShield Wizard** page, click **Finish**.

6. On the Start menu, click the **ShoreTel Connect** icon to launch the client.

---

**Installing the ShoreTel Connect client on OS X**

**Note**

Before installing the ShoreTel Connect client, uninstall any versions of ShoreTel Communicator on your computer.

1. Do one of the following:
   - Open the e-mail notification from your ShoreTel administrator that describes how to install the ShoreTel Connect client, and click the link to install the client.
   - In a browser, enter `<FQDN>/shorewareResources/ClientInstall`, where **FQDN** is your company's fully qualified domain name, and click the ShoreTel Connect client.

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

2. Double-click the installation file.

3. In the ShoreTel Connect screen, drag the **ShoreTel Connect** icon into the **Applications** folder and double-click the icon to launch the client.
CHAPTER 2

Using the ShoreTel Connect Client

This chapter provides information on how to use the ShoreTel Connect client.

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Signing into the ShoreTel Connect Client

You can sign into the ShoreTel Connect client using Windows or ShoreTel credentials:

1. Double-click the ShoreTel Connect client icon and enter the following details:
   - Email or Username
   - Password

2. Select:
   - If you are signing in using Windows credentials, select the *Use Windows Credentials* checkbox to fetch your credentials.
   - To save your credentials, select the *Remember this and log me in automatically next time* checkbox.

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

4. In the *Server* field, enter the fully qualified domain name (FQDN).

5. Click *Log In*.

To Sign out from the ShoreTel Connect client, click the `<username>` tab, and click *Log Out*.

Changing ShoreTel Connect client Password

You can change the password for the ShoreTel Connect client account.

To change the password:

1. Click *Preferences* for MAC OS or *Settings* for Windows.

2. Click *Account > Login*.

3. Enter:
   - Current password
   - New password
   - Confirm new password

4. Click *Set New Password*. 
Navigating through the ShoreTel Connect Client Interface

The ShoreTel Connect client consists of three panes based on the options you select on the dashboard as shown in Figure 1.

- **Client menu bar**—Use the ShoreTel drop-down on the client menu bar to launch the Settings page, check for Updates, and access the User Guide.

- **Dial Pad**—Use the dial pad to dial a phone number.

- **Quick Dialer Search Bar**—Use the quick dialer search bar to search for a name, number, an email address, or company name.

- **Dashboard**—Dashboard is the default and the main navigation pane:
  - `<username>`—Click the `<username>` tab to view or edit your profile information.
  - **People**—Use People tab to view your contacts. You can call or chat with a selected contact.
  - **Recent**—Click the Recent tab to view previous call, voicemail, and chat logs.
  - **Events**—Click the Events tab to view your past and upcoming calendar appointments. To view your Outlook appointments, synchronize your Connect client with Microsoft Exchange.
Workgroups—Click the Workgroups tab to view active workgroup calls for a user and the current workgroup state of the user. To view information about workgroups, you must be a member of a workgroup and have the appropriate license type.

**Note**  
Workgroup feature is available for onsite/premise customers only.

You can compress or decompress the dashboard view by clicking up/down arrow icon. In compressed view, you can mouse hover on each icon to view the tool tip.

---

**Figure 2: Dashboard Compressed View**

---

**Note**  
The compressed or decompressed view remains unchanged when you close and restart the Connect client.

- **Notification**—The Notification area shows incoming calls, voicemail messages, events, or any error messages.
- **Interaction Area**—The Interaction area shows the list of all conversations.
- **Second Pane**—The second pane displays the information based on what you select on the dashboard.
- **Third Pane**—The third pane displays the information based on what you select on the second pane. For example, if 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**—View the details of the selected contact.
- **Conversation History**—View the history for the selected contact.
- **IM Input Field**—Type your instant messages to the selected contact.

Click the minimize button at the top-right corner of a pane to close the pane.
Adding Shortcuts for Client Toolbar Tasks

You can add shortcuts for your most used or preferred operations. The configured buttons function as shortcuts for operations that require more actions to accomplish the same task. Use these shortcut buttons to perform a one-click operation for monitoring a call, starting a voice recording, opening the agent queue monitor, activating the softphone, or any other option.

To enable this feature, your ShoreTel administrator must first configure the Client Toolbars programmable buttons in the ShoreTel Connect Director for each user.

The list of functions that you had configured in ShoreTel Connect Director is displayed in a client window as shown in Figure 3. To view or hide Add Shortcut from the ShoreTel Connect client, click ShoreTel drop-down on the client menu bar and toggle Show Toolbar.

To add tasks to the Add Shortcut list:

1. Click Add Shortcut.
2. Click the tasks to add to the shortcut list. You can add up to 10 tasks.
   
   You can also drag and drop to re-order the task.
3. Click the task button to remove the tasks from the list.

The Add Shortcut page consists of two panes as shown in Figure 3.

![Figure 3: Add Shortcut Interface](image)
Selecting Preferred Language

You can select the language for your deskphone and the ShoreTel Connect client interface.

1. On the Dashboard, click the <username> tab.
2. Click Preferences for MAC OS or Settings for Windows and then click Language.
   
   If you have an operating system in Spanish, French, or German language, the ShoreTel Connect client tries to use the same language as that of the operating system. For other languages, the ShoreTel Connect client uses English as the default language. The ShoreTel Collaboration for Web page always uses the same language as that of the operating system, regardless of the language selected in preferences.

3. Select the required language for your deskphone from the Deskphone & voicemail menus drop-down list.
   
   You must exit and restart the client for the change to take effect.

4. Select the required language for the ShoreTel Connect client interface from the I want to use this application in drop-down list.
   
   You must exit and restart the client for the change to take effect.

ShoreTel Connect Client Logs

The ShoreTel Connect client creates a log file each time the user logs in. The logs are used to help the ShoreTel Technical Support with debugging problems that may arise during the client operation. Users can send the log files to the ShoreTel Administrator while opening a troubleshooting ticket.

To send the client logs, click Start > All Programs > ShoreTel > Support > Send Client Logs and follow the instructions.
CHAPTER 3

Managing Contacts

This chapter provides information on how to manage your contacts.

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Reordering a Contact Group............................................................................... 21
Editing or Deleting a Contact Group................................................................. 21
Managing Contacts

The ShoreTel Connect client enables you to organize and manage your contacts. You can click in the **Quick Dialer Search** bar to view the system directory.

To find a contact, type any of the following in the **Quick Dialer Search** bar:

- First Name
- Last Name
- Email address
- Company’s name
- Extension number
- Double token (single letter and double letter of the contact’s name)

The flowchart below describes the process of adding a contact and viewing contact’s information.
Adding a Contact

You can add a contact with or without Microsoft Exchange integration.

To add a contact when Microsoft Exchange Outlook is integrated:

1. Do one of the following:
   - Click the Recent tab, right-click the contact, and select **Add as a Contact**.
   - For Windows, an Untitled - Contact form is displayed in Outlook.
   - For OS X, an address book contact form is displayed.
   - Click the People tab, and click **+New Contact** at the bottom left corner of the second pane.
   - For Windows, an Untitled - Contact form is displayed in Outlook.
   - For OS X, an address book contact form is displayed.

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

3. Do one of the following:
   - For Windows, click **Save & Close**.
   - For OS X, click **Done**.

To add a contact when Microsoft Exchange Outlook is not integrated:

1. Repeat steps 1 and 2.

2. Click **Add Contact**.

Viewing a Contact’s Information

1. Type the contact name or extension in the **Quick Dialer Search** bar.

2. Click the name of the contact.

3. Click **+ Info** to view the contact details. Click **- Hide Info** to hide the contact details.

To see the company name, department name, and phone number of a contact from the **Quick Dialer Search bar**:

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

2. Toggle to show or hide the **Show Company Name**, **Show Department Name**, and **Show Phone Number**.

Deleting a Contact

If you have created a contact using the ShoreTel Connect client, you can edit and delete a contact.
To delete a contact:

1. Type the contact name or extension in the **Quick Dialer Search** bar.
2. Click the name of the contact that you want to delete.
3. Click **+ Info** below the profile picture.
4. Click **Edit Contact**.
   
   Click **Delete Contact**.

You can add a contact in the ShoreTel Connect client either directly (if Microsoft Outlook is not integrated) or through Microsoft Outlook (if Outlook is integrated).

The following applies when Outlook is integrated with the Connect client:

- You cannot delete contact from the ShoreTel Connect client, if the contacts are imported from Outlook or system added contacts (from ShoreTel Director).

  To delete a contact from Microsoft Outlook:

  a. Click **People** tab in Microsoft Outlook.

  b. Select **Client Contacts** under **My Contacts**.

  c. Select the contact that you want to delete.

  d. Click **Delete**.

The following applies when Outlook is not integrated with the Connect client:

- You can delete a contact from the ShoreTel Connect client, if you added a contact using the ShoreTel Connect client UI only (that is, not through Outlook UI or in systems where Outlook is not installed).

### Adding a Contact to your Favorite List

1. Type the contact name or extension in the **Quick Dialer Search** bar.
2. Click the **Star** icon next to the contact name that you want to mark as favorite.
3. To remove the contact from the favorites list, click the **Star** icon again next to the contact name.

### Viewing Favorites

1. Click the **People** tab on the dashboard.
2. Click the **Favorites** tab on the second pane to view the list of contacts marked as favorite.
   
   You can search a contact by entering the contact name, or extension in the **Search** field.
Creating a Contact Group

1. Click the **People** tab on the dashboard.
2. Click the **Groups** tab, and click **+New Group** at the bottom left corner of the second pane.
3. In the **Name** field, type a group name.
4. Click the **Quick Dialer Search** bar, and drag and drop the contacts from the search results.
5. Click **Save Changes** to save a group.

Reordering a Contact Group

1. Click the **People** tab on the dashboard.
2. Click the **Groups** tab to view all the groups created.
3. Click the group header and drag and drop to the required position.

Any changes to the order of groups is persistent between the client restarts.

Editing or Deleting a Contact Group

1. Click the **People > Groups** tabs on the dashboard.
2. Click the group header.
3. Click **Edit Group:**
   - Add or remove contacts, and click **Save Changes**.
     You can also reorder the contacts within the group by dragging and dropping the contacts to the required position. Any changes to the order of contacts is persistent between the client restarts and if user logs into another ShoreTel client on another machine, the name order will persist automatically.
   - Click **Delete Group** to delete the group.
4. Optionally, type the contact name or number in the **Quick Dialer Search** bar, and right-click the contact on the second pane, and select **Add to Group** to add the contact to the required group.

You can also search a contact within a group by entering the contact name, or extension in the **Search** field.
CHAPTER 4

Managing Availability States

This chapter provides information about managing availability states for the users and their contacts.

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- Configuring a Custom Availability State ......................................................... 26
- Allowing a Contact to Manage your Availability State .................................. 26
Understanding Availability States

You can check or verify the availability status of a contact on the ShoreTel Connect client before communicating with the contact. The ShoreTel Connect client automatically updates the availability status of users as they make and receive calls. When integrated with Microsoft Exchange, the ShoreTel Connect client also displays users’ meeting status.

You can monitor the availability of up to 500 contacts, and this can be configured by the ShoreTel administrator.

The different availability states are shown in Figure 4, and described in Table 2.

![Availability States](image)

**Table 2: Availability States**

<table>
<thead>
<tr>
<th>Color</th>
<th>State</th>
<th>Predefined/Customizable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Green</td>
<td>Available</td>
<td>Predefined</td>
<td>The contact is available for a call or IM session.</td>
</tr>
<tr>
<td>Yellow</td>
<td>In a Meeting</td>
<td>Predefined</td>
<td>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 to the contact's voicemail inbox or to the number configured using the availability routing as explained in Routing Calls on page 53.</td>
</tr>
<tr>
<td>Red</td>
<td>Out of Office</td>
<td>Predefined</td>
<td>The contact is out of office and can be reached only through an IM. If you dial this contact, the call will be routed to the contact’s voicemail inbox or to the number configured using the availability routing, as explained in Routing Calls on page 53.</td>
</tr>
</tbody>
</table>
Viewing Availability State

In condensed view, you can view the user’s availability state by hovering over the availability state strip for a contact. A tool tip displays the user’s availability and telephone state.

Changing Availability State

The ShoreTel Connect client automatically updates your availability state when you use the system. You can configure the availability state by:

- Selecting a Predefined Availability State on page 25
- Configuring a Custom Availability State on page 26

Selecting a Predefined Availability State

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

<table>
<thead>
<tr>
<th>Color</th>
<th>State</th>
<th>Predefined/Customizable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red</td>
<td>Do not Disturb</td>
<td>Predefined</td>
<td>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 to the contact’s voicemail inbox or to the number configured using the availability routing, as explained in Routing Calls on page 53.</td>
</tr>
<tr>
<td>Red</td>
<td>Vacation</td>
<td>Predefined</td>
<td>The contact is on vacation, but can be reached through an IM. If you dial this contact, the call will be routed to the contact’s voicemail inbox or to the number configured using the availability routing, as explained in Routing Calls on page 53.</td>
</tr>
<tr>
<td>Gray</td>
<td>Custom</td>
<td>Customizable</td>
<td>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 to the contact’s voicemail inbox or to the number configured using the availability routing, as explained in Routing Calls on page 53.</td>
</tr>
</tbody>
</table>
2. Select one of the following availability states:
   - Available
   - In a Meeting
   - Out of Office
   - Do not Disturb
   - Vacation

**Configuring a Custom Availability State**

1. From the dashboard, click the drop-down menu to the left of the `<username>` tab.
2. Click the **Custom** availability state and choose the availability state from the list.
   - `<Available>` (Green)
   - `<Busy>` (Yellow)
   - `<Not Available>` (Red)

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

3. 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.

**Allowing a Contact to Manage your Availability State**

You can configure a contact to manage your availability state on the ShoreTel Connect client.

If your contact wants to manage your availability state:
   - The contact must have added you to a contact group.
   - The contact must have a Workgroup Supervisor or Operator license type and be configured with a specific class of service in ShoreTel Connect Director.

**Note**
Workgroup feature is available for onsite/premise customers only.

To manage your availability states:
1. On the dashboard, click the `<username>` tab.

2. Click **Preferences** for MAC OS or **Settings** for Windows.

3. Click **Account > Access**.

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

The contact is configured to change your availability state, until you revoke access by removing the contact from the access page.
CHAPTER

5

Managing Phones

This chapter provides information about managing deskphone, softphone, and external phones.

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Managing your Desk Phone

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

- Assigning your Desk Phone on page 30
- Customizing your Desk Phone on page 30
- Removing the Desk Phone Assignment on page 30

Assigning your Desk Phone

1. On the desk phone, press the Assign button.
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.
4. Verify 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 steps 1 to 3.
   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.

Customizing your Desk Phone

1. On the dashboard, click the <username> tab.
2. Click Preferences for MAC OS or Settings for Windows.
3. Click the Deskphone tab to display the desk phone options.
   ■ In the Wallpaper field, click the drop-down list, and select the preferred wallpaper.
   ■ In the Ringtone field, click the drop-down list, and select the preferred ringtone.

Removing the Desk Phone Assignment

1. On the dashboard, click the <username> tab.
2. Click the **Primary Assignment** tab.

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

   The deskphone option is removed from the **Primary Assignment** tab. Also, the corresponding extension number is unassigned for the desk phone.

---

### Using the Softphone

When you assign your extension to the softphone, incoming calls are routed to the ShoreTel Connect client. The desk phone functionality is disabled until you assign your desk phone again to the ShoreTel Connect client.

To assign your extension to softphone as explained in the following sections:

- Assigning Softphone on page 31
- Customizing the Softphone on page 32

---

### Assigning Softphone

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

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

   If the Softphone option is not displayed, contact your ShoreTel administrator.

3. Select either the **default** or **Microphone** from the drop-down list.

4. 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 3.
Customizing the Softphone

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

2. Click Preferences for MAC OS or Settings for Windows.

3. Click the Softphone tab to display the softphone options.

   If you do not see the Softphone tab, contact your ShoreTel administrator.

4. To switch to a different audio device, in the Capture audio through field, click the drop-down list, and select the preferred audio device.

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

5. Select On startup assign me to my softphone option to handle calls and voicemails from the time you first login.

6. Select Enable auto gain control option to enable the automatic control.

Assigning External Phones

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

2. Click the Primary Assignment tab.

3. Click the Select Number drop-down list.

   If you do not see the Select Number option, contact your ShoreTel administrator.

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

5. 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.

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

   - Automatically connect
   - Press 1 to connect

7. In the rings to try field, increment or decrement the number of rings to the external phone number before forwarding the call to your voicemail.

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

9. Click Use Selected Number to save the number.
Managing Calls

This chapter provides information about managing voice calls using the ShoreTel Connect client.

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Making a Voice Call

You can make a call from:

- Quick Dialer Search bar
- Directory
- Recent
- Dial pad

To make a call from the quick dialer search bar or from the system directory:

1. Type the contact details in the **Quick Dialer Search** bar on the dashboard.
   
   Enter the first or last name, extension, company name, department name, phone number, or an email address to search.

2. Do one of the following:
   
   - Double-click the contact in the second pane.
   - Click the contact, and click the green call icon 📞 in the third pane.

To make a call from history:

1. Click the **Recent** tab on the dashboard.

2. Repeat step 2.

To make a call from the dialpad:

1. Click the dialpad icon ☛ on the dashboard.

2. Enter the extension or the mobile number, and press enter.

Answering a Voice Call

- Click the green call icon 📞 on the dashboard to answer the call.

- Click the red call end icon ☎ to end the call.
Responding to a Call through IM

If you do not want to answer an incoming call, you can reject the call, and send an instant message.

1. View the incoming call in the notification area.
2. Click the drop-down list on the far left.
3. On the dashboard, type a message or select a canned message, and click Send.

Transferring a Call

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

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

Blind Transfer

You can do a blind transfer either using the contact card, drag and drop, or the contextual menu.

Note
Contextual menu is a pop-up menu that appears on drag and drop user interaction in the ShoreTel Connect client application.

To do a blind transfer using the contact card:
1. View the incoming call in the notification area.
2. Click the green call icon on the dashboard to answer the call.
Alternatively, click the green call transfer icon in the notification area. The contact page is displayed with the call dialog options.

3. Click the call transfer icon in the second pane.

4. Type a contact name or the phone number in the second pane search field, and press Enter.

To do a blind transfer using the drag and drop option:

1. View the incoming call in the notification area.

2. Type the contact name or number in the Quick Dialer Search bar, and select the contact.

3. Drag the selected contact and drop to the active call in the notification area.

   Alternatively, drag the active call in the notification area and drop on the contact to whom you want to transfer.

To do a blind transfer using the contextual menu:

1. View the incoming call in the notification area.

2. Type the contact name or number in the Quick Dialer Search bar, and select the contact.

3. You can hover on the selected contact for two seconds to view the contextual menu. Select Transfer Blind from the contextual menu to complete the blind transfer.
Transferring a Call

The flowchart below describes the different ways to transfer a call using Transfer, Consult, Park, Intercom, Whisper, and Voicemail options.

Transferring a Call Using the Transfer Option

You can transfer a call either using the contact card or the contextual menu.

To transfer a call using the contact card:

1. View the incoming call in the notification area.
2. Click the green call icon to answer the call.
3. Click the call transfer icon in the second pane.

Transferring a Call

View incoming call in the notification area

Click green call icon to answer

Click Call transfer icon in the second pane

Type contact name or number in the second pane search field

Click Transfer
Click Consult
Click Park
Click Intercom
Click Whisper
Click Voicemail

Transfer is done
Consult transfer is done
Call is parked
Contact is intercomed
Contact is whispered
Voicemail is sent
4. Type the contact name or the phone number in the second pane search field.

5. Click Transfer.

To transfer a call using the contextual menu:

1. View the incoming call in the notification area.

2. Click the green call icon ☎️ to answer the call.

3. Type the contact name or number in the Quick Dialer Search bar, and select the contact.

4. Drag the selected contact and hover on the active call in the notification area for two seconds to view the contextual menu.

   Alternatively, you can drag the active call in the notification area and hover on the selected contact for two seconds to view the contextual menu.

5. Select the required option from the contextual menu to complete the call transfer.

**Transferring a Call Using the Consult Option**

You can do a consult transfer either using the contact card or the contextual menu.

To transfer a call using the contact card:

1. View the incoming call in the notification area.

2. Click the green call icon ☎️ to answer the call.

3. Click the call transfer icon 📚 in the second pane.

4. Type the contact name or the phone number in the second pane search field.

5. Click Consult.

To transfer a call using the contextual menu:

1. View the incoming call in the notification area.

2. Click the green call icon ☎️ to answer the call.

3. Type the contact name or number in the Quick Dialer Search bar, and select the contact.

   Alternatively, you can select the contact from the People > Favorite tab in the second pane.

4. Drag the selected contact and hover on the active call in the notification area for two seconds to view the contextual menu.

   Alternatively, you can drag the active call in the notification area and hover on the selected contact for two seconds to view the contextual menu.
5. Select **Transfer Consult** from the contextual menu to complete the call transfer.

### Parking a Call

You can park a call either using the contact card or the contextual menu.

To park a call using the contact card:

1. View the incoming call in the notification area.
2. Click the green icon 📞 to answer the call.
3. Click the call transfer icon 🕵️ in the second pane.
4. Type the contact name or the phone number in the second pane search field.
5. Click the **Park** option.
6. Click 📥 icon to park the call.

To park a call using the contextual menu:

1. View the incoming call in the notification area.
2. Click the green call icon 📞 to answer the call.
3. Type the contact name or number in the **Quick Dialer Search** bar, and select the contact.
4. Drag the selected contact and hover on the active call in the notification area for two seconds to view the contextual menu.
   - Alternatively, you can drag the active call in the notification area and hover on the selected contact for two seconds to view the contextual menu.
5. Select **Park** from the contextual menu to complete the call transfer.
   - A “P” icon appears next to the contact name indicating that the call is parked on the contact’s call stack.
   - If the call is not answered at the specified extension, the call is returned to you with the routing slip highlighted indicating that you may have to deal with an annoyed caller.

### Park and Page

You can park the call and page the contact either using the contact card or the contextual menu. After receiving the parked call, the recipient can initiate two-way audio to allow for further conversation or merge the call to initiate a conference call.

To park and page a call using the contact card:
1. View the incoming call in the notification area.

2. Click the green call icon to answer the call.

3. Click the call transfer icon in the second pane.

4. Type the contact name or the phone number in the second pane search field.

5. Click the Park option.

6. Click icon to park and page the call.

To park and page a call using the contextual menu:

1. View the incoming call in the notification area.

2. Click the green call icon to answer the call.

3. Type the contact name or number in the Quick Dialer Search bar, and select the contact.

4. Drag the selected contact and hover on the active call in the notification area for two seconds to view the contextual menu.

   Alternatively, you can drag the active call in the notification area and hover on the selected contact for two seconds to view the contextual menu.

5. Select Park and Page from the contextual menu to complete the call transfer.

**Park and Intercom**

You can use the park and intercom option to place an intercom call, the recipient phone auto-answers with mute activated and broadcasts your message through the recipient’s speaker phone, headset, or handset. After receiving the intercom call, the recipient can initiate two-way audio to allow for further conversation or merge the call to initiate a conference call.

You can park and intercom a call either using the contact card or the contextual menu.

To park and intercom a call using the contact card:

1. View the incoming call in the notification area.

2. Click the green call icon to answer the call.

3. Click the call transfer icon in the second pane.

4. Type the contact name or the phone number in the second pane search field.

5. Click the Park option.
6. Click icon to park the call and place an intercom call to the selected contact.

To park and intercom a call using the contextual menu:

1. View the incoming call in the notification area.

2. Click the green call icon to answer the call.

3. Type the contact name or number in the Quick Dialer Search bar, and select the contact.

4. Drag the selected contact and hover on the active call in the notification area for two seconds to view the contextual menu.
   Alternatively, you can drag the active call in the notification area and hover on the selected contact for two seconds to view the contextual menu.

5. Select Park and Intercom from the contextual menu to complete the call transfer.

Transferring a Call Using the Intercom Option

You can transfer a call to an intercom either using the contact card or the contextual menu.

To transfer a call using the contact card:

1. View the incoming call in the notification area.

2. Click the green call icon to answer the call.

3. Click the call transfer icon in the second pane.

4. Type the contact name or the phone number in the second pane search field.

5. Click Intercom.

To transfer a call using the contextual menu:

1. View the incoming call in the notification area.

2. Click the green call icon to answer the call.

3. Type the contact name or number in the Quick Dialer Search bar, and select the contact.

4. Drag the selected contact and hover on the active call in the notification area for two seconds to view the contextual menu.
   Alternatively, you can drag the active call in the notification area and hover on the selected contact for two seconds to view the contextual menu.

5. Select Transfer Intercom from the contextual menu to complete the call transfer.
Transferring a Call Using the Whisper Option

You can do a whisper transfer either using the contact card or the contextual menu.

To transfer a call using the contact card:

1. View the incoming call in the notification area.
2. Click the green call icon to answer the call.
3. Click the call transfer icon in the second pane.
4. Type the contact name or the phone number in the second pane search field.
5. Click Whisper.

**Note**
Third user must be on the active call for the whisper transfer.

To transfer a call using the contextual menu:

1. View the incoming call in the notification area.
2. Click the green call icon to answer the call.
3. Type the contact name or number in the Quick Dialer Search bar, and select the contact.
4. Drag the selected contact and hover on the active call in the notification area for two seconds to view the contextual menu.
   Alternatively, you can drag the active call in the notification area and hover on the selected contact for two seconds to view the contextual menu.
5. Select Transfer Whisper from the contextual menu to complete the call transfer.

Transferring a Call to Voicemail

You can transfer a call to voicemail either using the contact card or the contextual menu.

To transfer a call using the contact card:

1. View the incoming call in the notification area.
2. Click the green call icon to answer the call.
3. Click the call transfer icon in the second pane.
4. Type the contact name or the phone number in the second pane search field.
5. Click **Voicemail**.

To transfer a call using the contextual menu:

1. View the incoming call in the notification area.

2. Click the green call icon 📞 to answer the call.

3. Type the contact name or number in the **Quick Dialer Search** bar, and select the contact.

4. Drag the selected contact and hover on the active call in the notification area for two seconds to view the contextual menu.

   Alternatively, you can drag the active call in the notification area and hover on the selected contact for two seconds to view the contextual menu.

5. Select **Transfer Mailbox** from the contextual menu to complete the call transfer.

### Blind Conference

You can add a participant to an active call without informing the third user to initiate a group call between the operator, caller, and the contact.

To do a blind conference using the contact card:

1. View the incoming call in the notification area.

2. Click the green call icon 📞 to answer the call.

3. Click the **Add Participant** 🗓 icon.

4. Type the participant name or extension in the second pane search field, and click **Conference**.

To do a blind conference using the contextual menu:

1. View the incoming call in the notification area.

2. Click the green call icon 📞 to answer the call.

3. Type the contact name or number in the **Quick Dialer Search** bar, and select the contact.

4. Drag the selected contact and hover on the active call in the notification area for two seconds to view the contextual menu.

   Alternatively, you can drag the active call in the notification area and hover on the selected contact for two seconds to view the contextual menu.

5. Select **Conference Blind** from the contextual menu to initiate the conference.
Consultative Conference

You can add a participant to an active call by consulting the third user to initiate a group call between the operator, caller, and the contact.

To do a consultative conference using the contact card:

1. View the incoming call in the notification area.
2. Click the green call icon 📞 to answer the call.
3. Click the Add Participant 👤 icon.
4. Type the participant name or extension in the second pane search field, and click Consult. The active call is placed on hold automatically. You can consult the third person.
5. Click on the Merge 👥 icon to initiate a conference call.

To do a consultative conference using the contextual menu:

1. View the incoming call in the notification area.
2. Click the green call icon 📞 to answer the call.
3. Type the contact name or number in the Quick Dialer Search bar, and select the contact.
4. Drag the selected contact and hover on the active call in the notification area for two seconds to view the contextual menu. Alternatively, you can drag the active call in the notification area and hover on the selected contact for two seconds to view the contextual menu.
5. Select Conference Consult from the contextual menu to initiate a conference.

Intercom Conference

You can add a participant to an active call by placing the active user on hold. Intercom conference directly places the call to the third user without ringing the phone line.

To do an intercom conference using the contact card:

1. View the incoming call in the notification area.
2. Click the green call icon 📞 to answer the call.
3. Click the Add Participant 👤 icon.
4. Type the participant name or extension in the second pane search field, and click Intercom.
The active call is placed on hold and the call to the third user is automatically answered on the phone line.

5. Click on the **Merge** icon to initiate a conference call.

To do a blind conference using the contextual menu:

1. View the incoming call in the notification area.

2. Click the green call icon **phone** to answer the call.

3. Type the contact name or number in the **Quick Dialer Search** bar, and select the contact.

4. Drag the selected contact and hover on the active call in the notification area for two seconds to view the contextual menu.

   Alternatively, you can drag the active call in the notification area and hover on the selected contact for two seconds to view the contextual menu.

5. Select **Conference Intercom** from the contextual menu to initiate a conference.

### Viewing Routing Slip and Call Note

Call Note allows you to take notes during the active call and Routing Slip displays the history of a call, call transfers, and the other call routing that has taken place on the active call.

---

**Note**

Routing slip is disabled by default.

---

To enable routing slip and call note:

1. Click the `<username>` tab.

2. Click **Preferences** for MAC OS or **Settings** for Windows and then click **Telephony**.

3. Check **Show access to routing slip and call note for each call in the dashboard**.

   The setting for this option persists between the Connect Client restarts.

   If this option is toggled ON,

   - The top call stack pane will have the routing slip always expanded by default.
   - Every call stack displays routing slip and call note buttons.

   You can toggle **icon** to view or hide the routing slip and **icon** to view or hide the call note for active call.
Table 3 describes the various call note status for an incoming call.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
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<tbody>
<tr>
<td>![Icon]</td>
<td>Call note is present, and call note section is closed.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Call note is present, and call note section is open.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>No call note, and call note section is closed.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>No call note, and call note section is open.</td>
</tr>
</tbody>
</table>

### Making a Video Call

To make a video call, the Primary Extension must be assigned to your Softphone (To assign extension to the softphone, see Assigning Softphone on page 31).

To make a video call:

1. Find and select a contact (For more information, see Managing Contacts on page 18).

2. Click the green call icon in the third pane or double-click the contact to make a voice call.

3. To start broadcasting your video to the other party, click on the Video Camera icon.

   You can also IM during the video call.

4. To end the video, click Turn off Video Camera icon.

### Setting Up Video Camera Preferences

You can set up the ShoreTel Connect client to use the video camera:

- By default
- Prompt you to turn on the camera
- Wait for you to activate the camera manually to get complete control of your video camera.

To set up the video camera:
1. Click the `<username>` tab, and then click **Preferences** for MAC OS or **Settings** for Windows.

2. Click **Video > Permissions**.

3. Select any one from the following video options:
   - Automatically start my camera without asking
   - Ask me if I want to use my camera
   - Never ask me, I'll turn the camera ON myself

4. Click **Video > Camera Setup**. Select the video device from the drop-down list. You can also view the preview of the selected video device.

### Managing Voicemail

Callers can leave a voicemail message if the call is not answered. The voicemail message is delivered to the assigned desk phone, the ShoreTel Connect client, and the email inbox.

This section explains the following:

- **Forwarding Calls to your Voicemail Inbox** on page 49
- **Leaving a Voicemail Message** on page 49
- **Accessing Voicemail Messages** on page 49
- **Listening to a New Voicemail Message** on page 49
- **Flagging a Voicemail Message** on page 50
- **Replying to a Voicemail Message** on page 50
- **Forwarding a Voicemail Message** on page 50
- **Deleting a Voicemail Message** on page 51
- **Restoring a Deleted Voicemail Message** on page 51
- **Configuring Email Notification for Voicemail Message** on page 51
- **Setting Popup Notification for Voicemail Message** on page 52
- **Changing your Voicemail Password** on page 52
When you receive an incoming call, click the red voicemail icon in the notification area. The caller is directed to record a voice message.

When a caller leaves a voicemail message, you receive a voicemail notification in the notification area.

**Leaving a Voicemail Message**

1. Dial a contact. (For more information, see Making a Voice Call on page 35.)
2. When you are prompted to leave a voicemail message, follow the instructions from the interactive voice response to record your voice message.

**Accessing Voicemail Messages**

1. Click the **Recent** tab on the dashboard.
2. Click the drop-down list on the top-left corner in the second pane and select **Voicemails**.
3. To access the voicemail messages for a specific category:
   - Click the **All** tab to view all voicemail messages.
   - Click the **Missed** tab to view missed voicemail messages.
   - Click the **Flagged** tab to view the flagged voicemail messages.
   - Click the **Deleted** tab to view the deleted voicemail messages.

   You can configure the time frame for retaining the deleted voicemail messages in the Connect client using the ShoreTel Director.

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

**Listening to a New Voicemail Message**

1. Click the green voicemail icon in the notification area.
2. Choose either the phone or speaker icon, and then click the play icon.
You can choose to reply to, forward, or delete the received voicemail.

**Flagging a Voicemail Message**

1. Click the Recent tab on the dashboard.
2. Click the All tab.
3. Right-click the voicemail you want to flag, and select Flag Voicemail.

**Replying to a Voicemail Message**

1. Access your voicemail messages as described in Accessing Voicemail Messages on page 49.
2. Click the voicemail that you want to reply to.
3. Click Reply and select any of the following icons:
   - Phone icon, to record the message through telephone device.
   - Speaker icon, to record the message through computer speaker.
4. Click the red circle icon to record your message.
5. Click the gray square icon to stop your recording.
6. Click the gray arrow icon to play your recorded message.
7. Edit the To and Subject fields as required.
8. Specify any desired options (Urgent, Private, Receipt, and Include Original) for sending the response.
9. Click Send.

**Forwarding a Voicemail Message**

1. Access your voicemail messages as described in Accessing Voicemail Messages on page 49.
2. Click the voicemail message that you want to forward.
3. Click Forward and select any of the following icons:
   - Phone icon, to record the message through telephone device.
   - Speaker icon, to record the message through computer speaker.
4. Click the red circle icon to record your message.

5. Click the gray square icon to stop your recording.

6. Click the gray arrow icon to play your recorded message.

7. Edit the To and Subject fields as required.

8. Specify any desired options (Urgent, Private and Receipt) for sending the message.

9. Click Send.

Deleting a Voicemail Message

1. Access your voicemail messages as described in Accessing Voicemail Messages on page 49.

2. Click the voicemail message that you want to delete.

3. Click Delete.

Restoring a Deleted Voicemail Message

1. Click the Recent tab on the dashboard.

2. Click the drop-down list in the second pane, and select Voicemails.

3. Click the Deleted tab.

4. Locate the voicemail that you want to restore.

5. Click Restore.

Configuring Email Notification for Voicemail Message

1. Click the <username> tab, and then click Preferences for MAC OS or Settings for Windows.

2. Click Notifications > Voicemail.

3. Select the Send email notification about incoming voicemail to option, and type the email address.

4. Do the following to customize the email notification:
   - To receive the voicemail as .wav file format, check Attach voicemail as a wave file checkbox.
   - To mark the voicemail as heard in your voicemail inbox, select the Mark voicemail as heard option.
Setting Popup Notification for Voicemail Message

1. Click the <username> tab, and then click Preferences for MAC OS or Settings for Windows.
2. Click Notifications > Popup.
3. To get a system notification for an incoming voicemail:
   - For Windows, check Show a system notification for a voicemail checkbox.
   - For OS X:
     a. Under Incoming Voicemail, click Configure via OS X Notification Center...
     b. In the Notification Center box, click the ShoreTel Connect client icon.
     c. Click any of the following:
        - None
        - Banners
        - Alerts

Changing your Voicemail Password

1. Click the <username> tab, and then click Preferences for MAC OS or Settings for Windows.
2. Click Voicemail > Setup.
3. Enter:
   - Current password
   - New password
   - Confirm new password
4. Click Set New Password.

Recording Voicemail Greeting Name

1. Click the <username> tab, and then click Preferences for MAC OS or Settings for Windows.
2. Click Voicemail > Setup.
3. Click the Record New Name.
4. Click the Record icon to start recording your name. When finished, click the Stop icon to stop the recording.
5. Click the Play icon to listen to the recorded greeting for any incoming voicemail messages.
6. Click **Save Recording** to save the recorded greeting.

7. Click **Discard Recording** to discard the recorded greeting, and repeat steps 5 to 8.

### Playing Envelope Information for Voicemail

1. Click the `<username>` tab, and then click **Preferences** for MAC OS or **Settings** for Windows.

2. Click **Voicemail > Playback**.

3. Select **Envelope information when listening to messages** to hear the received date and time of the voicemail.

   The system will announce the date and time when the voicemail was received in the user's inbox before playing the actual message.

### Routing Calls

Use the following methods to route incoming calls to the predefined external phones:

- Availability Routing (Optional) — To assign call routing rules with availability state.
- Power Routing — To set customized rules as per the requirement.

### Availability Routing

Availability Routing allows you to route incoming calls according to your availability state.

You can configure Availability Routing with or without Mobility.

#### Configure Availability Routing with Mobility

1. Click the `<username>` tab, and then click **Preferences** for MAC OS or **Settings** for Windows.

2. Click **Call Routing > Availability Routing**.

3. In the **When** field, click the drop-down list, and select one of the following Availability states:

   - Available
   - In a Meeting
   - Out of Office
   - On Vacation
   - Custom
   - DND
4. Click the **Start Wizard** on the right.

5. To specify your ShoreTel Mobility enabled device:
   - In the blank field, type 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*.

6. Click **Next**.

   The Simultaneous Ring page is displayed.

    **Note**

    By default, the Simultaneous Ring page displays an extension and a mobility device that are already included for simultaneous ring.

7. To enable an additional device, other than your extension and a mobility device to ring simultaneously:
   a. Enable the **Also simultaneously ring these numbers** option.
   b. Click the **Select Number** drop-down list.
   c. Select the appropriate option, and click **Use Selected Number**.

8. Click **Next**.

   To configure call forwarding, select one of the following options:

    **Note**

    If you are not available on any of the devices configured for simultaneous ringing, then you can route the incoming calls either to your voicemail or to any other external number with appropriate permissions.

   - Select **Keep ringing the numbers above**.
   
     Incoming calls will not be forwarded, and only the devices dedicated for simultaneous ringing are permitted to ring.

   - If you want to forward incoming calls to your voicemail or to another contact, do the following:
     a. 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.
Availability Routing

Managing Calls

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

c. 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 the contact name or the external number, if you have appropriate permissions.

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

9. Click Next.

The Voicemail Greeting: Recording & Playback page is displayed.

10. To record the voicemail greeting:

a. Click the record icon  to start recording your message. When finished, click the grey square icon  to stop the recording.

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

c. Click Save Recording to save the recorded greeting.

d. Click Discard Recording to discard the recorded greeting, and repeat steps 10a to 10c.

11. Click Next.

The Interacting with Greeting page is displayed.

12. To enable interaction with the voicemail greeting:

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

13. Click Done.

Configuring Availability Routing without Mobility

1. Click the <username> tab, and then click Preferences for MAC OS or Settings for Windows.

2. Click Call Routing > Availability Routing.

3. Click the Start Wizard.
The Simultaneous Ring page is displayed.

**Note**
By default, the Simultaneous Ring page displays the device that is already included for simultaneous ring.

4. To enable simultaneous ring for an additional device, do the following:
   a. Select the *Also simultaneously ring these numbers* option.
   b. Click the *Select Number* drop-down list.
   c. Select the additional number, and click *Use Selected Number*.

5. Click Next.

6. To configure call forwarding, select one of the following options:

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

   - Select *Keep ringing the number above*.
     Incoming calls will not be forwarded, and the devices dedicated for simultaneous ringing are only permitted to ring.
   - If you want to forward incoming calls to your voicemail, do the following:
     a. Select *Forward the call to* and click on the down arrow icon, and select *my voicemail*.
     b. Click the drop-down list to select a number for the rings before forwarding.
     c. In the *if I have more than X active calls forward immediately to* field, click the down arrow icon, and select *my voicemail*.
   - Select the *Always forward my calls to* option, and click the drop-down list, and select *my voicemail*.

7. Click Next.

8. To enable FindMe, do the following:
   a. Select *Enabled: Use my FindMe settings to continue routing the call*.
   b. Select any one of the following options:
      - Select *Ring my FindMe numbers sequentially before playing my voicemail*, and optionally select *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.
2. Select the appropriate option, and click **Use Selected Number**.

d. To add another FindMe number, repeat step 8c.

9. Click **Next**.

The Voicemail Greeting: Recording & Playback page is displayed.

10. To enable voicemail greeting, see **To record the voicemail greeting**: on page 55.

11. Click **Next**.

The Interacting with Greeting page is displayed.

12. To enable interacting with the voicemail greeting, see **To enable interaction with the voicemail greeting**: on page 55.

## Configuring Availability Routing Using Custom Settings

1. Click the `<username>` tab, and then click **Preferences** for MAC OS or **Settings** for Windows.

2. Click **Call Routing > Availability Routing**.

3. To configure a mobility device for the incoming calls, see **To specify your ShoreTel Mobility enabled device**: on page 54.

4. Click **Change** to configure the following individual options, as required:

   - **Simultaneous ringing**
     - For more information about configuring simultaneous ring with mobility enabled, see steps **To enable simultaneous ring for an additional device** on page 47.
     - For more information about configuring simultaneous ring without mobility enabled, see **To enable simultaneous ring for an additional device** on page 47.

   - **Incoming call forwarding**
     - For more information about incoming call forwarding with mobility enabled, see step 8 in **Configure Availability Routing with Mobility** on page 53.
     - For more information about incoming call forwarding without mobility enabled, see step 6 in **Configuring Availability Routing without Mobility** on page 55.

   - **Voicemail Greeting: Recording & Playback**
     For more information, see **To record the voicemail greeting**: on page 55.
Using Power Routing

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

Power Routing overrides Availability Routing.

Creating a Power Routing Rule

1. Click the <username> tab, and then click Preferences for MAC OS or Settings for Windows.

2. Click Call Routing > Power Routing.

3. Click Create New Power Rule.

4. In the Rule Name field, enter a <name> for the new power rule.

5. In the When field, choose a combination of the following conditions to build a custom file for when to forward a call:
   - + number matches
   - + dialed number
   - + my availability
   - + on the phone
   - + time is

6. To add a rule by matching a number:
   a. Click + number matches.
   b. Click the The number is drop-down list, and select a suitable option. (For a few of these options, you might have to enter an associated number in the corresponding field.)
   c. To create another rule, repeat steps 6a to 6b.

7. To add a rule based on the known dialed number:
   a. Click + dialed number.
   b. Click inside the Number caller dialed to reach me is field, and type in the known number.

8. To add a rule based on your availability:
   a. Click + my availability.
b. Check any of the following availability states:
   - Available
   - In a Meeting
   - Out of Office
   - Vacation
   - Custom
   - DND

9. To add a rule if you are already on a phone, click + on the phone.
10. To add a rule based on the time or on the day:
   a. Click + time is.
   b. Select either of the following:
      - If Time is selected, enter the From and To fields for the power rule.
      - If Day is selected, select the days for the power rule.
11. Under Then, click Forward call to and select any of the following options:
   - To forward the call to voicemail, select the my voicemail option.
   - To play a ring tone,
     - Click the my voicemail drop-down list and select play ringtone. An additional Standard Ring option is displayed.
     - Click on the drop-down list and select a ring tone option.
   - To forward the call to specific number, select the Select Number option and click in the Select Number field and type the desired number.
12. Click Create Rule.

**Modifying a Power Routing Rule**

1. Click the <username> tab, and then click Preferences for MAC OS or Settings for Windows.
2. Click Call Routing > Power Routing.
3. Click Edit for the power rule you want to edit.
4. Edit the steps as required. (For more information, see steps 5 to 11 of Creating a Power Routing Rule on page 58.)
5. Click Save Rule.

**Deleting a Power Routing Rule**

1. Click the <username> tab, and then click Preferences for MAC OS or Settings for Windows.
2. Click **Call Routing > Power Routing**.
3. Click **Delete** for the power rule you want to delete.

### Managing Call Options

To manage the call control options:

1. Click the `<username>` tab, and then click **Preferences** for MAC OS or **Settings** for Windows.
2. Click **Telephony**.
3. Click the **Maximum number of concurrent calls** drop-down list, and select a number in the range configured by your ShoreTel administrator.
4. Check **Suppress call waiting tone when I’m on a call**.
5. Check **Suppress dial tone when I’m off-hook in headset mode on an analog phone**.
6. Check **Close contact card after call ends** option to close the contact card soon after you end the call.
CHAPTER 7

Managing Instant Messaging

This chapter provides information about managing instant messaging.

- Sending an Instant Message ................................................................. 62
- Scheduling a Meeting with a Contact Group ....................................... 63
- Sending a Group Voicemail ............................................................... 64
- Managing Instant Messaging Notifications ........................................ 64
- Adding Canned IM Responses ........................................................... 65
- Blocking IM Notifications for Specific Users ....................................... 65
Sending an Instant Message

You can send instant messages to:

- Individuals
- Groups
- Multiple users

The flowchart describes the various ways to send instant messages to an individual, groups, and multiple users.
To send an instant message to individuals:

1. Find the contact (For more information, see Managing Contacts on page 18).
2. In the IM input field, type the message, and press Enter.

To send an instant message to groups:

1. Click the People > Groups tabs, and select a group.
   You can also send instant messages to an individual member of a group by selecting a particular member from the selected group.
2. Click Start Group Chat.
   You can also add more participants to the group after initiating a chat session.
3. Click the Add Participant icon on the IM page to add more participants to the active chat session.
4. In the Quick Dialer Search bar on the third pane, type the participant’s first or last name, extension, company name, phone number, or email address.
5. Select the participant from the search results.
6. Click Add Contact to Conversation.
7. Repeat steps 4 to 6 to add more participants.

To send an instant message to multiple users:

1. Find the contact (For more information, see Managing Contacts on page 18).
   You can add more participants only after initiating a chat session.
2. Follow steps 4 to 6 to add more participants to the active chat session.
3. In the IM input field, type the message and press Enter.
   You can initiate another chat session with the same participants from the Recent tab. Your chat will appear in Recent tab after all participants exit from the active chat session. If you want to make a voice call to individuals, groups, or multiple users, click the green call icon.

### Scheduling a Meeting with a Contact Group

1. Click the People tab on the dashboard.
2. Click the Groups tab, and select a group.
3. Click Schedule Meeting With Group.
4. Specify the details of the meeting.
5. Click Create Event Invite.
Sending a Group Voicemail

1. Click the **People** tab on the dashboard.
2. Click the **Groups** tab, and select a group.
3. Click **Send Group Voicemail**.
4. Select one of the following options:
   - To record the message through your desk phone's handset, click the phone icon.
   - To record the message through your computer speaker, click the speaker icon.
5. To start recording the message, click the red circle icon; to stop recording, click the gray square icon; to play the recorded message, click the gray arrow icon.
6. Enter the name for your recording in the **Subject** field.
7. Specify any of the following options for the message:
   - 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 when the recipient has listened to the voicemail.
8. Click **Send**.

Managing Instant Messaging Notifications

1. Click the `<username>` tab, and then click **Preferences** for MAC OS or **Settings** for Windows.
2. Click **Notifications > Popup**.
3. To enable instant messaging notification:
   - On Windows, select **Show a system notification for an incoming IM** option.
   - Select **Show IM content in the notification** option to see the IM message in the system notification.
   - Select **Keep notification on screen for** option, and click the drop-down list and select a number from the list to control the persistence of the IM notification on your system.
   - On OS X:
     1. Click **Configure via OS X Notification Center... in Incoming IM**.
2. In the Notification Center box, scroll down to select the **ShoreTel Connect client** icon and then click any of the following options:

- None
- Banners
- Alerts

4. To disable instant messaging notification:

- On Windows, disable the **Show a system notification for an incoming IM.**
- On OS X:
  1. Click **Configure via OS X Notification Center...**
  2. Select **Do Not Disturb** on the left notification area.

### Adding Canned IM Responses

You can respond with an IM message to an incoming call from another ShoreTel contact.

To add a canned IM response:

1. Click **Preferences** for MAC OS or **Settings** for Windows.
2. Click **IM > Canned IM Responses**.
3. Type your custom canned message, and click **Add Canned Response**.
4. Select the required canned messages from the text box, and click **Delete** to delete the canned message.

### Blocking IM Notifications for Specific Users

1. Click the `<username>` tab, and then click **Preferences** for MAC OS or **Settings** for Windows.
2. Click **IM > Block Notifications**.
3. Type the contact name to block the users from sending an IM.
CHAPTER

Integrating with Microsoft Exchange

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

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- Integrating Voicemail with Microsoft Outlook ................................................................................ 68
- Integrating Outlook Contacts with the ShoreTel Connect Client .................................................... 68
- Integrating Outlook Calendar with the ShoreTel Connect Client ...................................................... 69
- Integrating Office 365 Calendar with the ShoreTel Connect Client ................................................... 69
- Importing Shared Outlook Contact Folder ....................................................................................... 70
Integrating the ShoreTel Connect Client with Microsoft Exchange

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

- Synchronize a user’s calendar and change availability state.
- Enable a user to send invitations and notifications as Connect events through Outlook.

To integrate the ShoreTel Connect client with Microsoft Exchange:

1. Click the <username> tab, and then click Preferences for MAC OS or Settings for Windows.
2. Click Account > AD Credentials.
3. Enter your Microsoft Exchange/Outlook (Active Directory) credentials in the User name and Password fields.
4. Click Save Credentials.

Upon successful credentials validation, the Unlink ShoreTel Connect from Exchange link is displayed. You can click this link at 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 that you receive email notifications for every received voicemail.

To integrate voicemail with Outlook:

1. Click the <username> tab, and then click Preferences for MAC OS or Settings for Windows.
2. Click Voicemail > Contacts/Outlook.
3. Select the Show my voicemails inline in my Outlook inbox option.

Integrating Outlook Contacts with the ShoreTel Connect Client

You can import your personal contacts from Microsoft Outlook into the ShoreTel Connect client to call, message, or to hold a conference session.

To integrate your contacts from Microsoft Outlook with the ShoreTel Connect client:
1. Click the <username> tab, and then click Preferences for MAC OS or Settings for Windows.

2. Click Contacts/Outlook.

3. Select the Sync my Outlook contacts option.
   
   Contacts are synced every time ShoreTel Connect client is started.

4. Click +Show contact folders and select the folders that you want to sync with 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.

1. Click the <username> tab, and then click Preferences for MAC OS or Settings for Windows.

2. Click Contacts/Outlook.

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

   The ShoreTel 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.

4. Select the Use my Outlook Work Hours to switch ShoreTel Connect availability to “Out of Office” option to sync your availability state with the ShoreTel Connect client.

Integrating Office 365 Calendar with the ShoreTel Connect Client

You can integrate your Microsoft Office 365 Calendar with the ShoreTel Connect client to integrate conferencing and availability features.

1. Click the <username> tab, and then click Preferences for MAC OS or Settings for Windows.

2. Click Contacts/Outlook.

3. Select the Sync my Outlook calendar with my ShoreTel Connect availability modes option.
The ShoreTel 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.

4. Select the Use my Outlook Work Hours to switch ShoreTel Connect availability to “Out of Office” option to sync your availability state with the ShoreTel Connect client.

You must exit and restart the client for the change to take effect.

**Importing Shared Outlook Contact Folder**

You can import Outlook contact folders shared by other users into the ShoreTel Connect client.

To share contact folders with the other users:

1. In the Microsoft Outlook, select the People tab.
2. Right-click the contact folder that you want to share.
3. Click Share.

   An email notification is created with the shared contact folder details. You can send the notification to the required recipient.

To import contact folders shared by other users:

1. Open the shared invitation received in the mail, and click Open Folder.
   
   Outlook add-in plug-in syncs the contacts from that folder into your ShoreTel Connect client.
2. Launch the ShoreTel Connect client.
3. Click the <username> tab, and then click Preferences for MAC OS or Settings for Windows.
4. Click Contacts/Outlook.
3. Select the Sync my Outlook contacts option.

   Contacts are synced every time ShoreTel Connect client is started.
4. Click +Show contact folders and select the folders that you want to import into the ShoreTel Connect client.
This chapter provides information on how to create and manage ShoreTel conferences.

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Creating a Conference

1. Click the **Events** tab on the dashboard.

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

3. In the **Name** field, enter a name for the conference. This name is used in email notifications about the conference.

4. In the **Starts** fields, enter the date, and the start time of the conference.

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

6. 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.

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

8. In the **Meeting type** field, enter any of the following:
   - **Collaborative**—you only need to include the organizers and presenters. You can use this option when you are hosting a conference for a wide list of participants. Everyone is a host and a presenter in this conference type.
   - **Presentation**—you need to include the participants along with the organizers and presenters. You can use this option when you are hosting a conference for a limited number of participants.

9. In the **Organizers** field, enter the names of the people hosting the conference.

10. In the **Presenters** field, enter the names of people presenting during the conference.

11. For a conference with a Presentation meeting type, enter the names of the participants in the **Participants** field.

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

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

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

14. To attach any reference material for the participants, click **Choose from Dropbox** in the Files section. You must sign into Dropbox with your credentials for attaching files.
15. To configure settings for your conference, click to expand the **Meeting Settings** drop-down list, and then do the following:

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

   b. In the **Start the Meeting** section, choose one of the following options:
      - When anyone joins
      - When one of the organizers joins

   c. In the **Participants** section:
      - To announce the arrival of a participant on the conference call, select the **Announce when participants arrive** option, and select any of the following options:
        - Play a simple audio tone
        - Prompt participants to record their name, and announce when they join the meeting
      - To mute all participants joining the conference call, select the **Mute participants on entry** option.
      - To display the names of all participants who have joined the conference, select the **Show everyone’s name to all participants** option.
      - In the **Allow participants to IM with** area, configure one of the following options:
        - Everyone
        - Just the organizers
      - In the **When dialing out to participants** area, configure one of the following options:
        - Must press one to enter audio portion of the meeting
        - Participants are automatically added to the audio portion of the meeting

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

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, **Integrating with Microsoft Exchange** on page 67 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 4. Every time you click **Events** on the dashboard, the conference is listed on the **Upcoming** tab in the second pane.
### Creating a Conference from Microsoft Outlook

1. Launch Microsoft Outlook.

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

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 4 and appended to the email invite.

4. In the **To** field, enter the list of participants to invite to the conference. Click **Address Book** or **Check Names** to select or identify directory contacts.

5. To assign participant's role:
   a. Click **Conference > Settings** to open the conference settings window.
   b. Un-check **Collaborative meeting - everyone can present** field.
   c. Click the drop-down next to the participant's name and select the required role.
   d. Click **OK** to save.

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

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

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

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

10. Click **Response Options** to configure the responses received from the participants.

11. Select the time slot from the **Reminder** drop-down list to set a reminder.

### Table 4: ShoreTel Conference Details

<table>
<thead>
<tr>
<th>Conference Details</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>The meeting ID that is automatically generated by the ShoreTel system when an event is created.</td>
</tr>
<tr>
<td>Leader Code</td>
<td>The access code for the leader/host to join and host the conference.</td>
</tr>
<tr>
<td>Local Dial-in number</td>
<td>The conference call dial-in number for host and participants.</td>
</tr>
<tr>
<td>&lt;Web Conference link for leader/host&gt;</td>
<td>ShoreTel Conference web page link for the host.</td>
</tr>
<tr>
<td>Participant Code</td>
<td>The access code for the participants to join the conference call.</td>
</tr>
<tr>
<td>&lt;Web Conference link for participants&gt;</td>
<td>ShoreTel Conference web page link for the participants.</td>
</tr>
<tr>
<td>Password (optional)</td>
<td>The password to join the secured conference call.</td>
</tr>
</tbody>
</table>
12. Click **Recurrence** if you want the conference to occur more than once.

13. Click the **Available Outlook** option to configure any other preferences.

14. Click **Send**.

**Creating a Conference from My Conference Bridge**

You can use My Conference Bridge to join the conference directly from the ShoreTel Connect client without scheduling the conference in advance. You can also invite other users to join these conferences.

**Note**

The reservationless conference details are not editable and also date is not shown for these conferences.

To invite participants to conference:

1. Click the `<username>` tab.

2. Click the **My Conference Bridge** tab in the second pane.

3. Host can join the conference by doing any of the following:
   
   a. Click **Join My Event Now**.
   
   b. Launch the participant URL provided in My Conference Bridge tab in a web browser.

4. Click **Copy to Clipboard** to copy the conference information, and share the information with other users you want to invite.
   
   Optionally, click **Add Participant** icon and type the participant’s name that you want to invite and then click **Conference**.

5. To drop a participant:
   
   a. Click **+Info**.
   
   b. Click on the drop-down next to the participant’s name and select **Kick Out of Meeting**.

Refer to the following items for information about how reservationless conferences migrate from ShoreTel Communicator to ShoreTel Connect client:

- Users who have a reservationless conference that was previously configured in ShoreTel Communicator and who are unassigned to a service appliance will get an error message when trying to create a new event or if they try to join to an existing conference in the ShoreTel Connect Client. To remove these conferences from the Connect Client, users should manually delete the old conferences from the mail exchange.

- Users who have a reservationless conference that was previously configured in ShoreTel Communicator and who are assigned to a service appliance will have a reservationless conference created during migration, and the settings defined previously will remain valid.
While access codes on a migrated reservationless conference remain valid, the **When dialing out to participants** parameter in the event screen will always be set to **Must press one to enter audio portion of the meeting** regardless if the conference was previously configured with **Participants are automatically added to the audio portion of the meeting**.

**Note**
Reservationless conferences cannot be edited or changed after migration. Ensure that you have the reservationless conference(s) configured as required prior to migration.

- Users who do not have a reservationless conference(s) previously configured in ShoreTel Communicator but who are assigned to a service appliance will have a reservationless conference(s) created during migration, and the settings defined previously will remain valid.

While access codes on a migrated reservationless conference remain valid, the **When dialing out to participants** parameter in the event screen will always be set to **Must press one to enter audio portion of the meeting** regardless if the conference was configured with **Participants are automatically added to the audio portion of the meeting**.

**Note**
Reservationless conferences cannot be edited or changed after migration. Ensure that you have the reservationless conference(s) configured as required prior to migration.

- Users who do not have a reservationless conference previously configured in ShoreTel Communicator and who are not assigned to a service appliance will not have a reservationless conference created during migration.

**Accessing Recordings Made with ShoreTel Communicator**

Prior to migrating from ShoreTel Communicator to ShoreTel Connect client, download the service appliance recordings made with ShoreTel Communicator and save them to the local system. While the downloaded recordings cannot be played in ShoreTel Connect client, you can use a flash player to play them.

**Viewing Conferences**

1. Click the **Events** tab on the dashboard.
2. Click the **Upcoming** tab to view the list of conferences in the future.
   
   The list is sorted by date, from the current event to the future events.

3. Click the **Past** tab to view the list of conferences in the past.
   
   The list is sorted by date, from the most recent to the most oldest.
Downloading the iCalendar Data (ICS) File for a Conference

The 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 data file:

1. Click the **Events** tab on the dashboard.
2. Click the **Upcoming** tab to view all upcoming conferences.
3. Select the conference in the second pane to download the ICS file.
4. 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`.
5. Enter the file name and select the location, and click **Save**.
6. Locate the file on your computer, and double-click to open the iCalendar file.
7. Review all the information about the conference, and save to your calendar.

Joining a Conference

You can join a conference from the ShoreTel Connect client in the following ways:

- **Joining a Conference from the Notification Area**: Use 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.
- **Joining a Conference from the Events Tab**: Use this procedure to join the conference prior to a notification.
- **Joining a Conference from Your Calendar**: Use this procedure to join the conference from your calendar.
The flowchart below describes the different ways to join a conference.

Joining a Conference from the Notification Area

1. If you see a notification with a green call icon and a green launch icon for an upcoming conference on the dashboard, proceed to the next step. Otherwise, see Joining a Conference from the Events Tab on page 79, and follow the procedure listed in that section.

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

3. Do any of the following to dial into the conference:
   - To configure a call back, click the Call Me option, enter the number, and click Call Me.
   - Click the green call icon in the second pane. If you have assigned a desk phone or a cell phone to the ShoreTel Connect client, the assigned phone rings. If nothing happens see Chapter 5, Managing Phones on page 29.

4. Click the red call end icon to end the audio conference.
Joining a Conference from the Events Tab

1. Click the Events tab on the dashboard.
2. Click the Upcoming tab to view all upcoming conferences.
3. Select the conference to join.
4. Click View Screenshare to join.
5. 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, click the Call Me option, enter the number, and click Call Me.
   - Click the green call icon in the second pane. If you have assigned a desk phone or a cell phone to the ShoreTel Connect client, the assigned phone rings. If nothing happens see Chapter 5, Managing Phones on page 29.
6. Click the red call end icon to end the audio conference.

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 data 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 4 on page 74.
3. Click the Click Here to Join link.
4. Enter your name in the Introduce yourself as field, and click Enter.
5. 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, click the Call Me option, enter the number, and click Call Me.
Click the green call icon \( \text{📞} \) in the second pane. If you have assigned a desk phone or a cell phone to the ShoreTel Connect client, the assigned phone rings. If nothing happens see Chapter 5, Managing Phones on page 29.

6. Click the red call end icon \( \text{📞} \) to end the audio conference.

**Recording a Conference**

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

1. Click the conference notification.

2. Click the REC icon \( \text{ REC } \) to start recording the conference.

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

3. After you are done with the recording, click the REC icon \( \text{ REC } \) again.

   **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 Joining a Conference on page 77.
   - The conference recordings play on all the web browsers, except Microsoft Internet Explorer 11.

**Canceling a Conference**

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

**Canceling a Conference from the Connect Client**

1. Click the Events tab on the dashboard.

2. Click the Upcoming tab to view the list of conferences in the future.

   The list is sorted by date, from the current event to future events.

3. Click the conference to cancel.

4. Click Cancel Meeting at the bottom of the third pane.
5. 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).

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

---

**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.

1. Launch Microsoft Outlook.
2. Open the conference appointment in the Outlook calendar.
3. Click **Cancel Meeting** at the top left corner of the Outlook ribbon.
4. Click **Send Cancellation** to notify participants of the cancellation.
Conferencing Using ShoreTel Connect Client for Web

This chapter provides information on launching ShoreTel Conference with the use of ShoreTel Connect client for Web.

Overview ........................................................................................................................................... 84
Using the ShoreTel Connect Client for Web .................................................................................. 84
Using Group Chat .......................................................................................................................... 85
Using Screen Sharing .................................................................................................................... 85
  Sharing the Entire Screen ............................................................................................................ 86
  Sharing a Portion of the Screen ................................................................................................. 87
  Sharing an Application Window ................................................................................................. 87
Overview

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

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

Using the ShoreTel Connect Client for Web

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

2. Click I Agree.

   The navigation pane on the left displays:
   - **Meeting Title**—displays the conference name.
   - **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.
   - Enter your name in the **Introduce yourself as** box at the bottom of the navigation pane. You must introduce yourself to view the conference sharing.

3. You can dial into the conference using one of the following methods:
   - To take the call through the softphone, (your computer and headset), click **Call via Computer Audio**.
   - On the task bar at the bottom of the page, enter your number, and click **Call Me** to receive a call back to the specified number. On answering the call, you are automatically connected to the conference’s interactive voice response. You might be prompted to press 1, based on the meeting settings.
   - Dial the number and enter the code provided in the conference invitation.
   - Click on **More Info** to see the meeting details, and click **Copy** to copy the information.

4. 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 click the red call icon to leave the call any time during the conference.
Using Group Chat

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

1. Click the Group Chat icon on the left navigation pane.
2. Enter your message in the IM input field at the bottom of the IM chat window, and click Enter.

You will receive IM message notifications with a red pop-out. Click the group chat window or participant’s name to view the message.

Using Screen Sharing

You can use the screen sharing feature to present material to conference participants. You can share the entire screen, a portion of the screen, or an application window.

Note

You must have a SA100/400 UCB to share the screen with the participants, otherwise, the share icon is grayed out.
The flowchart below describes the various ways to share the screen.

Sharing the Entire Screen

You can share your entire computer screen with the participants. Participants can view the entire computer screen and all your actions on the computer, until you pause or stop the sharing.

When full screen sharing is enabled, the edges of the screen are outlined by a red border. This indicates that the portion inside the red rectangular area is being shared. By default, the sharing is paused until you manually start sharing.

1. Click the **Share** icon on the conference task bar.
2. Click **Share Full Screen**.

   **Note**
   When the users attempts to share the screen in the Edge browser for the first-time, the ShoreTel Connect client for Web displays multiple pop-ups to install the ShoreTel Presenter.

3. If you are a first-time user, when you are prompted to install the presenter software, select the appropriate option.

   After the software or plugin is installed, screen sharing is enabled.

4. Click the play icon at the top of the page to start sharing.

5. Click the close icon at the top of the page to stop sharing.

### Sharing a Portion of the Screen

If you do not want the participants to view your entire screen, you can choose to share only a portion of your screen that you can highlight and move around as required.

When rectangular area sharing is enabled, a red rectangular window is displayed. This indicates that the portion inside the red rectangular area is being shared. By default, the sharing is paused until you manually start sharing.

1. Click the **Share** icon on the conference task bar.

2. Click **Share Area**.

   **Note**
   When the users attempts to share the screen in the Edge browser for the first-time, the ShoreTel Connect client for Web displays multiple pop-ups to install the ShoreTel Presenter.

3. If you are a first-time user, when you are prompted to install the presenter software, select the appropriate option.

   After the software or plugin is installed, screen sharing is enabled.

4. Click the play icon at the top of the rectangular area to start sharing.

5. 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, you can use the application window sharing option.
The selected application is enabled for sharing and is marked by a red border to indicate the area that is being shared. By default, the sharing is paused until you manually start sharing.

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

2. Click Share Window.

---

**Note**

When the users attempts to share the screen in the Edge browser for the first-time, the ShoreTel Connect client for Web displays multiple pop-ups to install the ShoreTel Presenter.

---

3. If you are a first-time user, when you are prompted to install the presenter software, select the appropriate option.

   After the software or plugin is installed, screen sharing is enabled.

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

5. Click the play icon at the top of the application window to start sharing.

6. Click the close icon at the top of the application window to stop sharing.
This chapter provides information about sharing screens and files.

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Sharing Screens with a Contact

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

1. Click the People tab or enter the contact name/number in the Quick Dialer Search bar on the dashboard.

2. Click the contact in the second pane.

3. Click the three-point icon in the third pane to share your screen.

   **Note**

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

4. Do one of the following:
   - Click **Share Full Screen** to share your entire computer screen with your contact. The information displayed on your screen is visible to your contact.
   - Click **Share Area** to share a movable rectangular area that you can use to share specific portions of your screen.
   - Click **Share Window** to share 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 with your contact.

   A screen sharing invite is sent to your contact as a notification. During this time, your computer screen is paused for sharing and is marked by a green rectangular border marking the area to be shared.

5. The contact must either click the green accept icon to accept viewing your screen, or the red close icon to reject the sharing invite.

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

7. To call or have a conference with your contact, click the green call icon in the third pane (For information about using this feature, see Joining a Conference on page 77).

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 ShoreTel Connect client user accounts.

Setting a Sound Notification

Managing History

Viewing your Interaction History for all Contacts

Viewing your Interaction History for a Single Contact

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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.

1. Click the <username> tab, and then click Preferences for MAC OS or Settings for Windows.
2. Click Notifications > Sounds.
3. In the Audio Alerts field, select ON.
4. In the For event field, click the drop-down list on the right, and select any of the following:
   - 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
5. Select Play alert, 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.
Managing History

You can view the history of your interactions for all your contacts at once or for only a specific contact.

Viewing your Interaction History for all Contacts.

1. Click the **Recent** tab on the dashboard.

2. Click the drop-down list on the top-right corner to filter for any specific interactions:
   - Everything
   - Calls
   - Voicemails
   - Messages

   You can search for a phrase within an IM history when a contact card is opened for a group or an individual in the IM history search in the IM input window.

3. To view your interaction history for all contacts, select **Everything** from the drop-down list, and click the **All** tab.
4. To view only missed interactions, select **Everything** from the drop-down list, and click the **Missed** tab.

5. To view flagged voicemails, select **Everything** or **Voicemail** from the drop-down list, and click the **Flagged** tab.

6. To view only deleted voicemails, select **Everything** or **Voicemail** from the drop-down list, and click the **Deleted** tab.

7. To view only the call interactions, select **Calls** from the drop-down list.

8. To view only the IM interactions, select **Messages** from the drop-down list.

---

**Viewing your Interaction History for a Single Contact**

1. Find a contact (For more information, see Managing Contacts on page 18).

2. To view all interactions from the history, select **Everything** from the drop-down list.

3. To view only call interactions with the contact from the history, select **Calls** from the drop-down list.
   
   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.

4. To view only the Voicemail interaction with the contact from the history, select **Voicemails** from the drop-down list.
   
   For more information about voicemail reply, forward, and delete, see the following sections:
   
   - **Replying to a Voicemail Message** on page 50
   - **Forwarding a Voicemail Message** on page 50
   - **Deleting a Voicemail Message** on page 51

5. To view only the IM interaction with the contact, select **Messages** from the drop-down list.
CHAPTER 13

Managing Workgroups

This chapter provides information about managing workgroups using the ShoreTel Connect client.

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- Workgroups Access Types .......................................................... 96
- Managing Workgroups ............................................................... 96
  - Viewing Workgroups Information .............................................. 96
  - Filtering Queued Calls .............................................................. 97
  - Managing Agents ..................................................................... 97
  - Shared Voicemail Using Workgroups ....................................... 98
  - Setting Queue Monitor Alert Threshold .................................... 98
Workgroups Overview

Agents and supervisors can see the Workgroups tab on the ShoreTel Connect client dashboard if they belong to any workgroup. The Workgroups tab displays the active workgroup calls for a user, and the current workgroup state.

Table 5. lists the workgroups states of agents and supervisors.

<table>
<thead>
<tr>
<th>Color</th>
<th>State</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Green</td>
<td>Logged In</td>
<td>Logged into the workgroups</td>
</tr>
<tr>
<td>Grey</td>
<td>Logged Out</td>
<td>Logged out of the workgroups</td>
</tr>
<tr>
<td>Yellow</td>
<td>Wrap Up</td>
<td>Agent or Supervisor is performing wrap-up work for a workgroup call.</td>
</tr>
</tbody>
</table>

Workgroups Access Types

You must be a member of a workgroup and have necessary license type to view information about workgroups. Your license type determines what type of member you are.

Types of workgroup members are:

- **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.

Managing Workgroups

Viewing Workgroups Information

Click **Workgroups** tab on the dashboard to view the following workgroup information in the second pane:

- Workgroup name—Name of the workgroup
- Queued Calls—Number of calls queued for the workgroup
- Longest Queued—Call that has been on hold for the longest time period in the queue
- Longest Call—Call that has the longest call duration

Note

Workgroup feature is available for onsite/premise customers only.
To see the workgroup details, select a workgroup, and click **Show Workgroup Details**. For all the workgroups selected in second pane, supervisor can view all queued calls, agents and voicemail messages in third pane. You can also select the workgroups by clicking the **Settings** option at the bottom of the second pane.

### Filtering Queued Calls

Select **Queues** tab in the third pane for queued calls details. When you filter the workgroup information by queued calls, you can see name of the caller or telephone number. If caller name is not associated with the call, the following information is displayed:

- Duration that the queued call has been in the workgroup
- Duration of the call in the system
- Dialed number
- Caller ID

**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.

### Managing Agents

You can see the number of agents logged into the workgroup and manage them using the **Agents** tab in the third pane. Agents tab is visible to supervisors only. Supervisors can perform all the actions in the **Agents** tab without logging into Workgroups.

To change the status of all agents, select **Agents** tab in the third pane, click **Set All Agents** from the drop-down list and select any of the following:

- Logged-In
- Logged-Out
- Wrap-Up
- End Wrap-Up

In the agent row, the delegated supervisor can change the agent's availability state by clicking the availability state option.

Supervisors can control the following actions for a single agent without logging into Workgroups:

- Call an agent
- Check voicemail
- Log in an agent
- Log off an agent
Put the agent in Wrap Up state

Change the Availability state of an agent

With the proper permissions configured by the ShoreTel administrator, supervisors can also perform the following actions on agents:

- Pick up a call
- Un a call
- Intercom
- Whisper page the agent
- Silent coach the agent
- Barge in on the agent
- Silent monitor the agent
- Setting a Sound Notification
- Enable picking up calls and ing calls

**Shared Voicemail Using Workgroups**

Any user belonging to a workgroup and does not have supervisor or operator license type can view and listen to voicemails without logging into a workgroup. Select **Voicemails** tab in the third pane to view and listen to voicemails. Configuring Workgroup Notifications

To configure the workgroup notifications:
1. Click the `<username>` tab, and then click **Preferences** for MAC OS or **Settings** for Windows.
2. Click **Workgroups**.
3. Check **Show me notifications when calls arrive in queue** to view the notifications for the queued calls.
   
   Enter the time duration in **Keep the notification on screen for** field to set the time for displaying the notifications on the screen.

4. Check **Continue to show notification while logged out of workgroups** to view the workgroup notifications after you log out.

**Setting Queue Monitor Alert Threshold**

1. To specify the queue monitor alert thresholds and call arrive in queue notification, click **Settings** at the bottom of the second pane. You can also access Workgroup settings by:
- Click the `<username>` tab, and then click **Preferences** for MAC OS or **Settings** for Windows.
- Click **Workgroups**.

Supervisors can edit alert thresholds but agents can only view alert thresholds. Closing the preferences window or switching to another tab saves your threshold settings.

When the specified workgroup queue thresholds are exceeded, the queued calls number and/or call duration label color changes to red in the second pane. After the parameter drops below the threshold, the label color changes back to default gray. When the queue threshold exceeds the specified time and number, a sound is played. You can turn the sound on or off using the **Bell** icon at the bottom of the second pane.

To configure Queue Monitor Alert Threshold:

1. Click the `<username>` tab, and then click **Preferences** for MAC OS or **Settings** for Windows.
2. Click **Workgroups**.
3. In the **Queue Monitor Alert Threshold**, check the required Queue Monitor.
4. In the **Alert when calls in queue exceeds** field, increment or decrement the call queue number.

   This number determines the number of calls that can be queued before sending an alert to the user.

5. Optionally in the **queued time exceeds** field, enter the time duration to set the queue monitor alert threshold.
This chapter provides information on how to enable, and access operator specific features.

Operator Features

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Operator Features

ShoreTel Operator license provides the operators with additional features and functionalities within the ShoreTel Connect client that makes easier to manage large volume of calls within the application.

You must have operator license to access operator features and functionalities. Refer ShoreTel Connect System Administration Guide to enable operator license for ONSITE and Support site for CLOUD.

ShoreTel Connect client provides special features for operators as listed in Table 6.

Table 6: Operator Features Overview

<table>
<thead>
<tr>
<th>Features</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drag and drop</td>
<td>Operators can left-click and drag an object in both the directions; from call stack to a contact and vice versa.</td>
</tr>
</tbody>
</table>
| Drag and hover    | Operators can left-click and hover an object in both the directions; from call stack to a contact and vice versa to access more telephony functions. The advanced telephony functions are:  
  - Blind Transfer  
  - Consultative Transfer  
  - Intercom Transfer  
  - Transfer to Mailbox  
  - Park  
  - Park and Page  
  - Park and Intercom  
  - Blind Conference  
  - Consultative Conference  
  - Intercom Conference  
  For more information, refer to Transferring a Call on page 38. |
| Call stack orientation | Operators can view the oldest call at the top of the call stack and the most recent call at the bottom. |
| Double click to answer | To answer an incoming call, operators can:  
  - Double-click anywhere in the incoming call notification area.  
  - Click the green call icon as other users. |
Routing slip

Operators can view or hide the routing slip for each call by toggling the routing slip icon in the incoming call notification area.

**Note:** Routing slip is disabled by default.

To enable routing slip, refer to [Viewing Routing Slip and Call Note](#) on page 46.

Ringing lines

Operators can view when the contact phone is ringing both in normal and condensed view in the **People** panel.

When contact phone is ringing, their current availability state flashes with the incoming ring. Ringing also displays below the contact name in the normal view:

- On receiving an incoming call, user’s availability state flickers and changes to **Orange** with a **Ringing** indicator.
- On answering the call, user’s availability state remains orange with **On the Phone** indicator.
- If the user is already on a call and receives another incoming call, user’s availability state flickers and the indicator changes to **Ringing**.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Routing slip</td>
<td>Operators can view or hide the routing slip for each call by toggling the routing slip icon in the incoming call notification area. <strong>Note:</strong> Routing slip is disabled by default. To enable routing slip, refer to <a href="#">Viewing Routing Slip and Call Note</a> on page 46.</td>
</tr>
<tr>
<td>Ringing lines</td>
<td>Operators can view when the contact phone is ringing both in normal and condensed view in the <strong>People</strong> panel. When contact phone is ringing, their current availability state flashes with the incoming ring. Ringing also displays below the contact name in the normal view: On receiving an incoming call, user’s availability state flickers and changes to <strong>Orange</strong> with a <strong>Ringing</strong> indicator. On answering the call, user’s availability state remains orange with <strong>On the Phone</strong> indicator. If the user is already on a call and receives another incoming call, user’s availability state flickers and the indicator changes to <strong>Ringing</strong>.</td>
</tr>
</tbody>
</table>