

IP Phones

Quick Start Guide



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Phone Support

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For the most effective support, please provide your main contact with the following information to relay to Sterling Communications:

- Name
- Phone Extension
- Date & Time of the problem
- Description of the problem

New Service and Sales:

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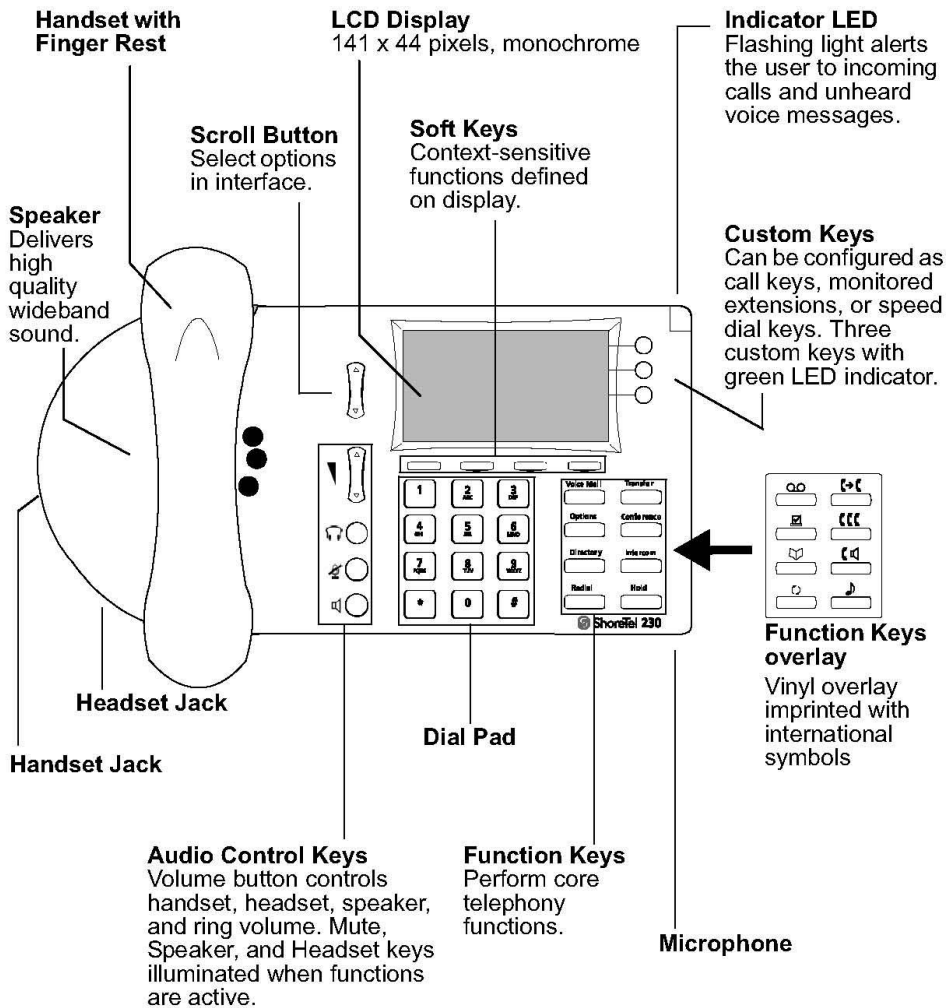
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Getting Started

Phone Display

Welcome to your ShoreTel IP phone. Your phone has many unique features, including an intuitive visual display, custom call keys, soft keys, 5 call handling modes, transfer, conference, intercom, and much more.

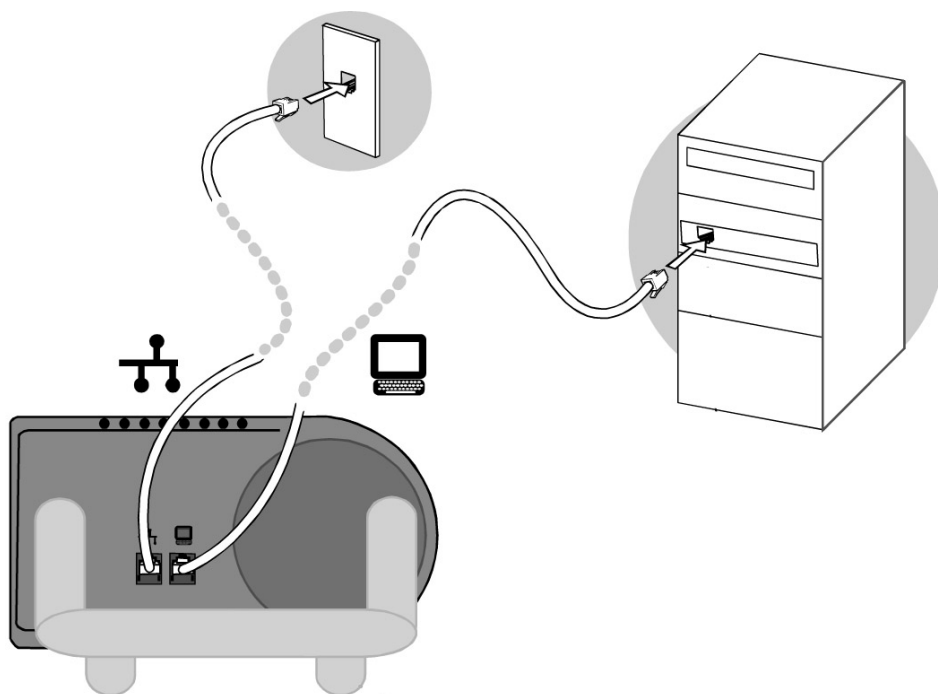


Getting Started

Connecting Your Phone

Connect the network cable between the LAN port on the back of the phone and an Ethernet jack in the workspace.






You can share a single LAN wall jack between your IP phone and computer by daisy-chaining the PC off the second Ethernet port on your phone. (The phone connects to the wall jack and the PC connects to the phone.)











Getting Started

Status Icons



Main Display

-  Unheard Voice Messages
-  Missed Calls
-  Logged Into Workgroup
-  Logged Into Workgroup, In Wrap-Up
-  Logged Out of Workgroup



Custom Keys - Call

-  On Hook
-  Off Hook
-  Inactive / Do Not Disturb
-  Incoming Call (Animated)
-  On a Call
-  On a Conference Call
-  Call On Hold / Parked
-  Remote Hold

Custom Keys - Monitored Extension

-  Idle
-  Inactive / Do Not Disturb
-  Unheard Voice Messages
-  Do Not Disturb / Unheard Messages
-  Incoming Call (Animated)
-  On a Call
-  Incoming Call and On a Call
-  On a Conference Call
-  Call On Hold / Parked

Adjust Volume - For Handset, Headset, or Speakerphone

-  Active State - Increase/decrease handset, headset or speakerphone volume
-  Inactive State - Increase/decrease ringing volume

Getting Started

Reboot Your Phone

Hard Reboot: To reboot your phone, unplug the LAN port connection, wait a few seconds and plug back in. Your phone will go through a rebooting process that may take a few minutes.

Soft Reboot: Press  + R-E-S-E-T + #

Key Options

Soft Function Key

Soft keys are context sensitive and change depending on the state of the phone. Options will appear in your display above your soft keys when your phone is in an inactive or active state. The function of the soft keys change according to system functions (transfers, conference, calls, etc).

Hard Function Key

Hard keys perform core telephony functions. The function of the hard keys remain the same regardless of the state of the phone.

Note: For easy reference, soft keys are shown italicized and hard keys are capitalized and bolded within the text. Example: *Dial* soft key, **DIRECTORY** hard key



Audio Controls

Ring Tone Volume

To adjust the ring volume, while the handset is on hook and the speakerphone is off, press ▲ and ▼ on the volume button. By pressing ▼ repeatedly you can turn the ringer volume off.

Handset Volume

To adjust the handset volume, while the handset is off hook, press ▲ and ▼ on the volume button.

Headset Volume


To adjust the headset volume, while the headset LED is illuminated, press ▲ and ▼ on the volume button.

Speakerphone Volume

To adjust the speakerphone volume, while the speakerphone LED is illuminated, press ▲ and ▼ on the volume button.



Muting an Active Call

To mute the active call, press the mute button.  The LED turns red. To un-mute the call, press the mute button again.

Basic Phone Call Management



Placing Calls

Step 1: To place a call:

- Pick up the handset or
- Press the speakerphone button or
- Press the headset button

Step 2: For an internal call, dial the extension or use the **DIRECTORY** button. For an external call, dial "9" then the phone number.



Step 3: To end a call:

- Hang up the handset or
- Press the speakerphone button again or
- Press the headset button again or
- Press the *HangUp* soft key

Note: Step 1 is optional.

Note: Soft key options enable you to make corrections to the number as well as gives you activation options.

Directory Function

You can use the Directory button to find extension numbers on your network.

Step 1: Press the **DIRECTORY** function button.

Step 2: Select the desired name by using the Scroll button to find the desired name or press the dial pad keys that correspond with the first few letters of the extension's owner's first or last name.

Step 3: To activate the call, Press the *Dial* soft key, or lift up your handset or activate your Speakerphone or Headset button.

Directory



Basic Phone Call Management



Answering Calls

An incoming call can be identified by ring tones, the blinking Incoming Call Icon, and the red LED light in the top right corner of your phone. A double ring signals an internal call, while a single ring signals an external call.

If Caller ID information is available, that information will appear on your display.

To Answer A Call:

- Pick up the handset or
- Press the speakerphone button or
- Press the headset button or
- Press the blinking call appearance button or
- Press the *Answer* soft key

Sending A Call To Voice Mail

To send an incoming call directly to your voice mail, press the *To VM* soft key.



Answering Multiple Calls

If you receive an incoming call while you are on the phone, you can do one of the following:

- Press the blinking call appearance button to answer the incoming call, which will automatically put the current call on hold.
- Press the *Answer* soft key, which will answer the new call and put the current call on hold.

Note: To return to any call on hold, press the blinking call appearance button corresponding to that call.

Picking Up Another Extension

The Pickup function allows users to pick up a call ringing on another extension.

To Pickup A Call Ringing On Another Extension:

Step 1: Press the *Pickup* soft key.

Step 2: Enter the extension number of the ringing phone or use your **DIRECTORY**.

Step 3: Press the *Pickup* soft key again.

Note: Users must know which extension is ringing.

Parking and Unparking Calls

Parking Calls

Park allows users to place an active call on hold on another extension. Calls that have been parked can remain on hold for up to 2 minutes. If the parked call is not answered within the designated time, it will ring back to the extension from where it originally was parked from.

To Park An Active Call:

Step 1: Press the *Park* soft key.

Step 2: Enter the extension number or use the **DIRECTORY** to select park destination.

Step 3: Press the *Park* soft key again.

Unparking Calls

Unpark allows users to retrieve a call that is on hold on another extension.

To UnPark A Hold Call:

Step 1: Press the *Unpark* soft key.

Step 2: Enter the extension number or use your **DIRECTORY** to select the phone with the call on hold.

Step 3: Press the *Unpark* soft key again.

Transferring A Call

There are multiple options to choose from in how you transfer a call from your extension to another number:

Blind Transfer:

Step 1: Press the **TRANSFER** button which puts the call on hold.

Step 2: At the screen prompt

- Dial the extension, or
- Use the **DIRECTORY** button, or
- Dial "9" + external number

Step 3: Hang up or press *Transf* soft key.



Transferring A Call

Transfer

Consult To Speak To Recipient Before Transferring:

Step 1: Press the **TRANSFER** button which puts the call on hold.

Step 2: At the screen prompt

- Dial the extension, or
- Use the **DIRECTORY** button, or
- Dial "9" + external number

Step 3: Press the *Conslt* soft key

Step 4: Press the *Yes* soft key to complete the transfer, or press the *Cancel* soft key to abandon the transfer and return to the original call.

Consult By Intercom:

Step 1: Press the **TRANSFER** button which puts the call on hold.

Step 2: At the screen prompt

- Dial the extension, or
- Use the **DIRECTORY** button

Step 3: Press the *More* soft key.

Step 4: Press the *Intcom* soft key.

Send Call To Recipient's Voice Mailbox:

Step 1: Press the **TRANSFER** button which puts the call on hold.

Step 2: At the screen prompt

- Dial the extension, or
- Use the **DIRECTORY** button

Step 3: Press the *More* soft key.

Step 4: Press the *to MB* soft key.

Conference Calling

Conference

To conference a party into an active call you have two options:

Option 1- Ring The Party Directly:

Step 1: Press the **CONFERENCE** button which will put the call on hold.

Step 2: Enter the number of the party you would like to conference by choosing one of the options below:

- Dial the extension number, or
- Use the **DIRECTORY** for an internal number, or
- Dial "9" + the external number

Step 3: Press the *Confrn* soft key. All parties will be connected when the last party answers.

Option 2 - Consult Recipient Before Bringing Them Into The Conference Call:

Step 1: Press the **CONFERENCE** button which will put the call on hold.

Step 2: Enter the number of the party you would like to conference by choosing one of the options below:

- Dial the extension number, or
- Use the **DIRECTORY** for an internal number, or
- Dial "9" + the external number

Step 3: Press the *Conslt* soft key.

Step 4: Press the *Yes* soft key to complete the conference call, or press the *Cancel* soft key to return to the original call with no conference.

To add additional parties, repeat steps of desired conference option.

To display all conferenced parties once a conference is established, use the *Show* soft key to display all conferenced parties.

To disconnect a party, use the scroll key to select a party and then press the *Drop* soft key.

Note: To join two separate active calls, press the *Join* soft key. This will merge the separate calls into one conference call.

Note: Conference calls have a default limit of 3 participants, including the caller. A 6-way conference option is available, please contact Sterling Communications for more details.

Intercom Calling

Intercom



The intercom function allows you to connect with another internal party without ringing the party by utilizing the speakerphone.

To Intercom Another Party:

Step 1: Press the **INTERCOM** button.

Step 2: Dial the extension number or use the **DIRECTORY** button to choose the party.

Step 3: Press the *Intcom* soft key.

Step 4: To end the call:

- Press the *HangUp* soft key, or
- Press the speakerphone button

Note: Step 1 is optional

Whisper Page

The Whisper Page feature allows you to break into an active call to speak with an internal user without the remote caller hearing the interruption and without you hearing the remote caller.

Step 1: Press the **INTERCOM** button.

Step 2: Dial the extension number or use the **DIRECTORY** button to choose the party. (Once the number is input, your display will indicate if there is an active call on that extension).

Step 3: Press the *Whispr* soft key and begin speaking.

Step 4: Press the *HangUp* soft key to disconnect.

Note: Whisper Page is an option that requires special setup prior to using.

Hold

Hold



To Place A Call On Hold:

- Press the **HOLD** button, or
- Press the custom key associated with that call

To Take A Call Off Hold:

- Press the **HOLD** button again
- Press the custom key with the blinking green LED
- Press the *Unhold* soft key

Redial and Checking Missed Calls

Redial

The Redial list holds up to twenty of the most recent calls that have occurred on the phone, including calls made, calls received and missed calls. The date and time information appears directly above the soft keys for the selected call.

To Redial A Call:

Step 1: Press the **REDIAL** button.

Step 2: Scroll to select the number you want to call .

Step 3: To activate the call

- Press the *Dial* soft key, or
- Pick up the handset, or
- Activate your speakerphone, or
- Activate your headset

Note: Press **REDIAL** twice to dial the last number you called.

Speed Dial

Speed dial allows you to pick from a list of labeled numbers that have been preset by the user. Each user can store up to 20 numbers in their phone.

Dial By List:

Step 1: Press the **DIRECTORY** button.

Step 2: Press the *Speed* soft key.

Step 3: Scroll the list to select a number.

Step 4: Press the *Dial* soft key to activate the call.

To Dial by Keypad, press the number on the keypad that corresponds to the Speed Dial Number and hold down for 1.5 seconds to activate the call.

Note: Speed dial setup can only be done through the Call Manager or Web Call Manager.

Call Handling Mode

There are 5 different ways the system handles incoming calls on a user's extension. The system allows the user to modify each mode and specify how incoming calls are handled. Each mode contains a separate voicemail recording, allowing different messages to be played in each mode.

- 1. Standard:** For use during normal working hours while the user is available to take calls; default will ring the phone three times before forwarding to the user's voicemail.
- 2. In a Meeting:** For use when the user is away from the phone and in a meeting; default will automatically send the caller to the user's voicemail.
- 3. Out of Office:** For use when the user is away from the phone and is out of the office due to non-normal working hours; default will automatically send the caller to the user's voicemail.
- 4. Extended Absence:** For use when the user will be away from the phone and out of the office for an extended period of time; default will automatically send the caller to the user's voice mail.
- 5. Custom:** For use when the user will be away from the phone or in a setting where the user will need specialized call handling.

To Toggle Between Call Handling Modes:

Step 1: Press the *Mode* soft key

Step 2: You may repeatedly press the *Mode* soft key, or use the Scroll Button, or press the number on the Key pad that corresponds to the mode selection.

Step 3: Press the *OK* soft key to activate the mode selected.

Note: Use Call Manager or Web Call Manager to configure the modes with different call forwarding destinations and personal greetings.

Voice Mail



A steadily flashing light on your phone's upper right-most corner signifies that you have unheard messages. The number of unheard messages appears on the idle screen of your phone's display by the icon.

When you log in to voice mail for the first time the system will ask you to change your password. Your new password must be at least 4 digits, but not more than 26 digits. The system will also ask you to record your name. Please do so at initial login.

Note: Your company's dial-by-name directory relies on your recorded name.

Accessing Your Voice Mail

Voice Mail



From Your IP Phone:

Step 1: Press the **VOICE MAIL** button.

Step 2: Enter your password followed by #. (Default password is 1234.)

From Another Extension:

Step 1: Press the **VOICE MAIL** button, followed by #.

Step 2: Enter your extension number.

Step 3: Enter your voicemail password, followed by #.

From An External Phone:

Step 1: Dial your voice mail access number _____, followed by #.

Step 2: Enter your extension number _____.

Step 3: Enter your password, followed by #.

Voice Mail

Recording A Greeting

Each call handling mode requires a recorded greeting. You may change these greetings at any time. Please record each greeting on your initial set up so that it is ready when you change your call handling mode. Place your phone into the mode you want to record a greeting for.

Step 1: Log in to your voice mail with password _____, followed by #.

Step 2: Press "7" for Change Mailbox Options.

Step 3: Press "1" for Record a Greeting.

Step 4: Wait for the beep.

Step 5: Record your greeting, and press # when completed.

Step 6: Follow the prompts to enable greeting or re-record if need be.
(See Reference Guide)

Reassigning Your Extension

Extension Assignment is the ability to assign your extension to any other IP phone within the company. This function is to be used for temporary purposes when a remote user or user without a phone would like to work from a VoIP phone inside the office. If moving permanently, please move the phone with the user or obtain a dedicated phone from your VoIP phone administrator.

To Assign Your Extension:

Step 1: Press the **VOICE MAIL** button followed by the # key.

Step 2: Enter the user's extension to be moved and the password, then press #.

Step 3: At the main menu prompt, press "7" to change mailbox options.

Step 4: Press 3 to reassign the extension, then press "1" to assign the extension to that phone.

To Un-Assign Your Extension:

Step 1: Press the **VOICE MAIL** button followed by the # key.

Step 2: Enter the user's extension to be moved and the password, then press #.

Step 3: At the main menu prompt, press "7" to change mailbox options.

Step 4: Press "3" to reassign the extension, then press "2" to un-assign the extension.

Note: The extension will automatically return to the phone it was originally assigned to.

Options

Changing Auto Off-Hook Preference

This feature allows a user to select which audio path (speakerphone or headset) is automatically activated when placing or receiving calls.

Step 1: Press the **OPTIONS** button, enter your VM password, and press the *OK* soft key.

Step 2: Press “2” or scroll to the Auto Off-Hook option.

Step 3: Press the *Edit* soft key.

Step 4: Make your off-hook selection, then press the *OK* soft key.

Step 5: Press the *Done* soft key.

Changing Ring Tone

You have the option to choose from four ring tones:

Step 1: Press the **OPTIONS** button, enter your VM password, and press the *OK* soft key.

Step 2: Press “3” or scroll to select the Change Ring option.

Step 3: Press the *Edit* soft key.

Step 4: Use the scroll button to select the ring you want to hear, then press the *Ring* soft key to hear the selected ring tone.

Step 5: Press the *OK* soft key to activate the ring tone you want, then press the *Done* soft key.

Hands Free

Step 1: Press the **OPTIONS** button.

Step 2: Enter password and press the *OK* soft key.

Step 3: Use the Scroll key to select Hands Free.

Step 4: Press the *Done* soft key.