ShoreTel

Using Your SHORETEL IP530/560 PHONE

ShoreTel 530 / 560 IP Phone

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GETTING STARTED

Welcome to your ShoreTel™ IP phone! Your phone has many unique features, including an intuitive visual interface, custom keys, quick dialer directory, call handling modes for when you do not want to be disturbed, intercom, conferencing up to six lines, and much more.

Logging In

If you are using your phone for the first time, the phone's display will most likely read "Available," which means you can place calls but not receive them. You need to log in and assign this phone as your permanent extension. To log in:

1 Press Voice Mail .

2 Dial the extension number assigned to you by your administrator.

3 If your administrator assigned you a password, enter it now (otherwise enter a default password of 1234), and press **#**.

4 Enter a new 4-26 digit password (as permitted in Director's System Parameters page) followed by **#**. Repeat to confirm password.

5 Speak your name and press #, then press one of the following options:

Accept

1 Review

2 Rerecord

3 Delete

***** Cancel

6 Press **7** for voice mail options.

7 Press **3** to re-assign the extension, then press **1**.

You are now logged in. Your phone can receive calls, and you can check for new messages.

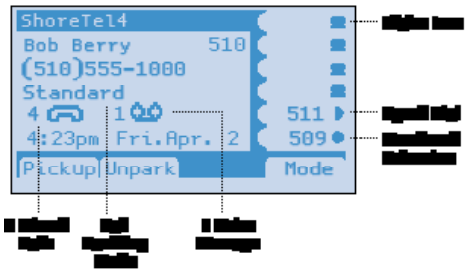
You can log in to any ShoreTel IP phone on your network to change your extension assignment to that phone. See page 20 for more information.

Your Phone's Display

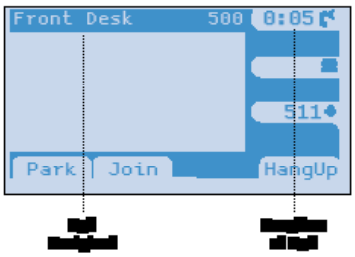
Your ShoreTel IP phone's display shows information about name and extension, call handling mode, call lines, monitored extensions, calls, duration of call, voice messages, date and time, soft key functions, and your phone's operating status.

GETTING STARTED

ShoreTel 560 Interface



Outgoing call: ShoreTel 530



Guide to 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

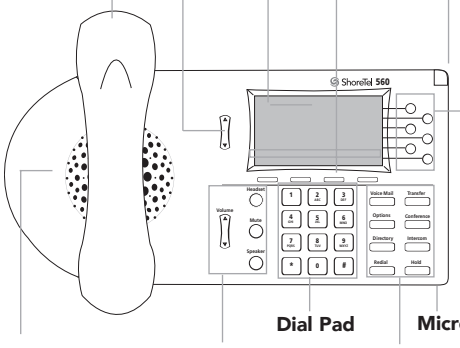
Custom Keys - Monitored Extension

- 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

Custom Keys - Speed Dial

- Speed Dial Extension

SHORETEL 530 / 560 IP PHONE



Handset with Finger Rest

LCD Display
160 x 80 pixel, 2-bit grayscale

Scroll Button
Select options in interface.

Soft Keys
Context-sensitive, functions defined on display.

Indicator LED
Flashing light alerts the user to incoming calls and unheard voice messages.

Custom Keys
Can be configured as call keys, monitored extensions, or speed dial keys.

ShoreTel 560
Six custom keys with tri-color LED indicators.

ShoreTel 530
Three custom keys.

Dial Pad

Microphone

Speaker
Delivers high-quality wideband sound.

Audio Control Keys
Volume button controls handset, speaker, and ring volume. Mute, Speaker, and Head-set keys illuminated when functions are active.

Function Keys
Perform core telephony functions.

PHONE OPERATION

About Your Custom Keys

Your custom keys can be configured based on the way you use your phone.

Call - The default function of a custom key is a call key, which shows the status of any incoming or outgoing calls from extensions you are not monitoring. At least one key on your phone must be configured this way, but your administrator can set a higher minimum in ShoreWare® Director's User's Personal Options page. The label for this kind of key is blank except for the icon that corresponds to the current status of that call line (see previous page for full list of icons). Press the key to:

- Activate the speakerphone when the phone is idle; the custom key on a ShoreTel 560 lights steady green.
- Put the caller on hold when you are on a call (you can't accidentally hang up on a call); the key on a ShoreTel 560 blinks green.

The key on a ShoreTel 560 blinks orange when a call is coming in.

Monitored Extension - Your administrator may have configured some keys to let you monitor other extensions in Director's User's Personal Options page. A monitored extension shows the extension number in the label area along with the current status of the extension. For more information, read The Basics of Extension Monitoring on page 14.

Speed Dial - Your administrator may have configured some keys to act as speed dials, or may have given you permission to do so (by freeing one more custom keys in Director's User's Personal Options page). Next to the speed dial icon in the label area is the extension number of the speed dial. Press this key once to dial the extension; after connected, you can press it again to place the call on hold.

Speed dial keys also provide a shortcut for such functions as transfer, conference, park, and intercom. See those sections in this book for more information.

For more information on speed dialing, including configuring custom keys and numbers on the keypad as speed dials, see page 9.

Placing Calls Off and On Hook

To place an internal call, pick up the handset, or press , or press a call key and dial the extension. If the phone is on hook, you can also just dial the extension on the keypad and press the **Dial** soft key.

PHONE OPERATION

To place an external call, dial the trunk access code, then the phone number.

If you have a monitored extension or a speed dial configured, you can also press that custom key to dial the corresponding phone number.

The call is now displayed next to the first available call key, and on the ShoreTel 560, the key is lit green. If you dialed on hook, you'll also see displayed the number of calls that are on the recipient's phone, and if his or her phone is in Do Not Disturb mode (indicated by "DND").

To end a call, hang up the handset, or press or , or press the **HangUp** soft key.

Using the Speakerphone or a Headset

You can interact with calls hands free by using a headset or the speakerphone.

• To use a headset, plug the headset into the headset jack on the side of the phone, then press . The LED in the button lights green. To return to handset mode, press again.

• To use the speakerphone, press . The LED in the button lights green. You can also initiate speakerphone mode by pressing the numbers on the keypad when you are not engaged in a call. To return to handset mode, press again.

If you know you will only use a speakerphone, hands-free mode makes operation smoothest by eliminating the internal dial tone when the handset is off hook. To enable hands-free mode:

1. Press

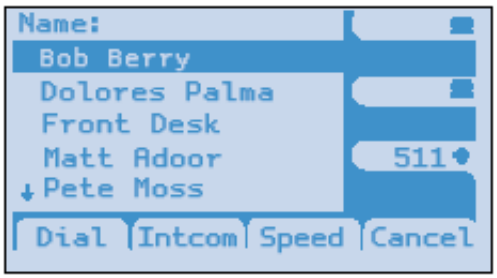
.
2. Enter your password, then press the **OK** soft key.
3. Press ▲ and ▼ on the scroll button next to the display to scroll until the Hands Free option is selected.
4. Press the **Edit** soft key.
5. Use the scroll button to select **Enable Hands Free**, then press the **OK** soft key.
6. Press the **Done** soft key.
7. Press either or so you can place and receive calls without having to press either of these buttons first.

You can also enable hands-free mode from Personal Call Manager or ShoreWare Web Access.

PHONE OPERATION

Using the Directory

You can use the Directory to find phone numbers on your network by pressing Directory, then:



• Press the keys that correspond with the first few letters of the extension's owner's first or last name to have the Directory narrow the number of entries for you. Press # for a space in a person's name and press * for any character. If you press an incorrect key, press the **Back** soft key to delete the character.

• Press ▲ and ▼ on the scroll button next to the display to scroll until the entry you're searching for is selected. Press the **Dial** soft key to dial the number; or, if you see a list of numbers after you press **Dial**, choose the number assigned to the person you wish to dial, and press the **OK** soft key.

You can also use the Directory to make an Intercom call by pressing the **Intcom** soft key on this screen, or when using Intercom on its own, and also when using transfer, park, unpark, and conference. See those sections in this guide for more information.

The Directory also lists any keypad speed dials you have configured in Personal Call Manager or ShoreWare Web Access when you press **Speed**. To dial a number from this screen, press and hold the corresponding number on the keypad, or use the scroll button to select an entry, then press the **Dial** soft key.

Speed Dialing

Speed dial allows you to dial an extension with one touch. There are two possible ways to speed dial:

• You can assign a speed dial to any number on your keypad using Personal Call Manager or Web Access.

• If there are enough free custom keys (determined by your administrator in Director's User's Personal Options page), you can assign a speed dial entry to a custom key on your phone.