

## Hargray DCMS – ShoreTel Training Guide (Verbiage)

### Phone Training (IP480/IP480g/IP485g):

1. First, we explain the use of the phone itself. Start with the **Number Keypad** in the lower-center of the phone and work clockwise around the phone.
  - a) Explain to the end-user that they must dial “9” before calling to an outside number. They may dial an internal extension by simply dialing the extension number.
  - b) The **Off-Hook Buttons** consist of **Speaker**, **Mute**, and **Headset**. The **Speaker** and **Headset** buttons will turn **Green** when they are active. The **Mute** button turns **Red** when active, this means that you can hear the caller but they can't hear you.
  - c) The **Volume Control** key allows you to control the volume of the phone in the phone's current state. Example: If the phone is idle, the key controls the volume of the ringer. If you are on Speaker, it controls the volume of the Speaker, etc.
  - d) The **Multi-Directional Selector** key allows you to select from different options on the screen when there are options to select. You will see these options later during the different operations of the phone.
  - e) There are **5 Soft Keys** below the screen which will change during different operations of the phone. The function of these keys coincides with the boxes that reside directly above them.

**Note: These keys are not programmable.**

There are 4 keys displayed during the idle state of the phone:

- a. **Pickup** – This key allows you to pick up any ringing phone as long as you know the extension number and that the phone is ringing. Simply press **Pickup**, dial the extension number of the ringing phone, and press **Pickup** again.
- b. **Unpark** – This function is related to the **Park** feature which is available when you are on a call. To **Park** a call is, in essence, to put the call on **Hold** on another extension. In order to **Park** a call, make or receive a call, press the **Park** key enter an extension you want to place the call on hold on, then press **Park** again. To **Unpark** the call, press **Unpark**, enter the extension that a call is parked on, then press **Unpark** again. Note: If a call is parked and is not unparked within 60 seconds, it will automatically ring back the extension who originally parked the call.
- c. **Mode** – This key allows you to change the **Call Handling Mode** of the extension. To change the **Mode** of the phone, simply press the **Mode** key, use the **Up/Down Selector** key or the **Number Keypad** to select the mode you wish to use, and press the **OK** soft key. The **Mode** the phone is in will then be displayed on the screen.

There are 5 different **Call Handling Modes**:

- i. **Standard** – This is the default mode of the phone. You should use this mode when you are at your extension, ready to receive phone calls.
- ii. **In a Meeting** – Use this mode when you are in a meeting. The greeting played will be the “canned” – “(Ext # or Recorded name) is in a meeting.” You may also record a personal greeting for this or any Call Handling Mode.

- iii. **Out of Office** – Use this mode when you are out of the office and unavailable to answer the phone.
  - iv. **Extended Absence** – Use this mode when you will be out of the office for an extended period and will be unable to check messages.
  - v. **Custom** – Use this mode for any “other” time you will be unable to answer the phone.
- d. Next is the **Options** key. In the **Options** menu, the **Up/Down Selector** key and soft keys can be used to change **Call Handling Mode** destinations, **Auto Off-Hook** preferences, **Headset type**, choose between 14 default **Ring Tones**, turn the **ringer on/off**, program **IP Phone Buttons**, change **Workgroup Agent state**, and set **Handsfree Mode (dial tone suppression)**. When entering the Options menu, the password is the same as your Voicemail password or, if you don’t have a mailbox, the default password of 1,2,3,4. These options may or may not be available depending on how user permissions are set up.
- f) The **Call Appearance Keys** are located to the left and right of the screen. These keys show calls as they come in to the extension. You can switch between calls by simply pressing the different **Call Appearance Keys**. The calls will automatically be placed on **Hold** when you switch between them. These keys show solid **Green** when they are active, slowly blinking **Green** when the phone is ringing, and quickly blinking **Green** or **Orange** if the call is on **Hold**.  
**Note: These keys are programmable.**
- g) The **Voicemail** key is directly below the **Multi-Directional Selector**. This key will access the extension’s **Visual Voicemail** or **dial into the Voicemail system** if the extension has a **Voicemail Box**.  
**Note: If the extension does not have a Voicemail Box, the system will prompt you to enter the extension number of an existing Voicemail Box.**  
**Note: When an extension’s mailbox has a message, the IP phone’s Red message waiting light at the phone’s top-right corner will blink.**  
 The initial setup of an extension’s **Voicemail Box** is as follows:
  - a. Press the Voicemail key.
  - b. Press the **Call VM** softkey
  - c. Enter the default password of 1, 2, 3, 4, #.
  - d. Enter a new password (not 1, 2, 3, 4)
  - e. Confirm the new password.
  - f. Record your full name and confirm.
- h) The next key below the Voicemail key is the **Directory** key. This function can be utilized in many of the other functions we will come to next, such as **Transfer and Conference**. The **Directory** key allows you to dial any extension on the system, even if you don’t know the extension number. Simply press the **Directory** key, select the name of the extension using the **Up/Down Selector** key or by dialing the letters of the name using the **Number Keypad**, then press the **Dial** soft key.

- i) The **History** key acts much like the Recent Calls key on a cellular phone. When the **History** key is pressed, the phone will display a rolling list of the last extension or telephone numbers dialed, received, or missed by your IP phone. If you wish to dial one of the numbers on the Redial list, select the number using the **Up/Down Selector** key, and press the **Dial** soft key to complete the call.

**NOTE: You may also press the Cancel soft key to leave the History menu.**

- j) Next we will go back up to the **Transfer** key. This key allows you to transfer calls to another extension. There are 3 different types of transfers:
- a. **Blind Transfer** – This transfer should be used when you want to send the call to another extension directly. To perform a **Blind Transfer**, simply make or take a call, press the **Transfer** key, *select the destination you want send the call to*, and press the **Transfer (Transf)** soft key.  
**Note: “select the destination you want to send the call to” – this means you should enter an extension number manually, select an extension number from the Directory, or dial “9” followed by an outside number you want to Transfer to.**
  - b. **Consultative Transfer** – This transfer should be used when you want to send the call to a party but you want to speak with the transferee before the transfer is completed. To perform a **Consultative Transfer**, make or take a call, press the **Transfer** key, *select the destination you want to send the call to*, and press the **Consult (Conslt)** soft key. When the transferee answers the call, you will be prompted, “**Transfer call?**” You may then press the **Yes** soft key to complete the transfer or the **Cancel** soft key to cancel the transfer.
  - c. **Transfer to Mailbox** – This transfer should be used when you want to send a call directly to someone’s Voicemail. To perform a **Transfer to Mailbox**, make or take a call, press the **Transfer** key, *select the destination you want to send the call to*, press the **More** soft key, then press the **To MB** soft key.
- k) Just below the Transfer key is the **Conference** key. The **Conference** key is used to conference multiple parties on one call. By default, each IP phone can perform a 3-way conference call (Up to 6-way conference call if resources are available). There are 2 different ways to conference calls:
- a. **Blind Conference** – This type of conference is used to directly conference in a party without speaking to the party before bringing the party into the conference. To perform a **Blind Conference**, make or take a call, press the **Conference** key, *select the destination you want to conference*, and press the **Conference (Confrn)** soft key.  
**Note: “select the destination you want to conference” – this means you should enter an extension number manually, select an extension number from the Directory, or dial “9” followed by an outside number you want to conference.**
  - b. **Consultative Conference** – This type of conference is used when you want to conference a party but you want to speak with the conferee before the conference is completed. To perform a **Consultative Conference**, make or take a call, press the **Conference** key, *select the destination you want to conference*, and

press the **Consult (Consit)** soft key. When the conferencee answers, you will be prompted, "**Join calls?**" You may then press the **Join** soft key to conference the parties together or the **Cancel** soft key to cancel the conference call.

- l) Finally the **Hold** key is used to place a call on hold. When the **Hold** key is pressed, the **Call Appearance** key on which the call resides will blink rapidly. To take the call off **Hold**, press the blinking **Call Appearance** key.