ShoreTel® 212k IP Phone User Guide

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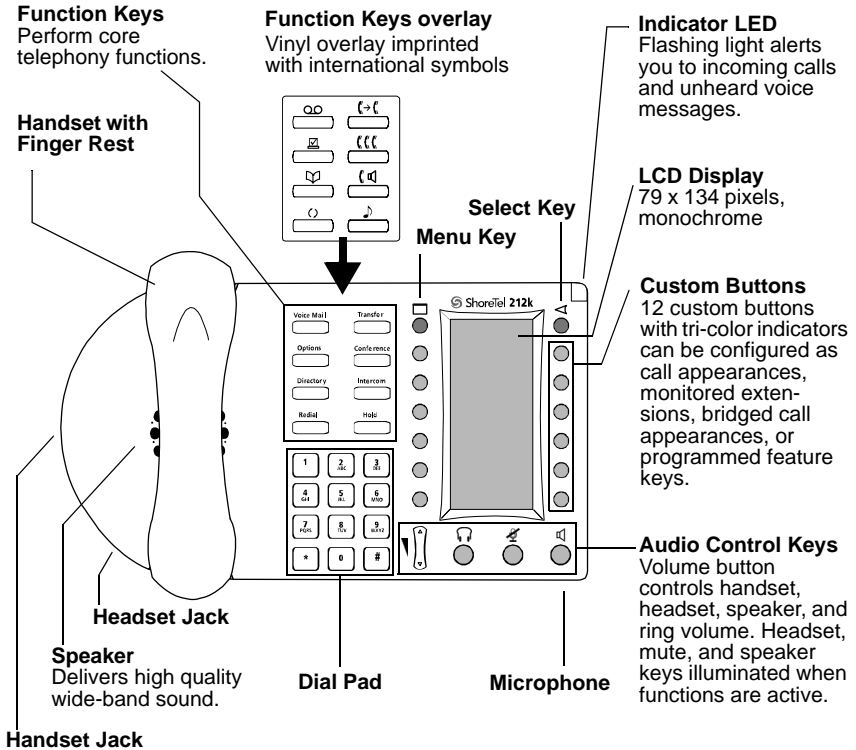Fax: +1.408.331.3333
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Contents

GETTING STARTED

Welcome to your ShoreTel™ IP phone! This user guide will help you configure your phone, learn how to make and take calls, as well as use advanced features.

Function Keys
Perform core telephony functions.

Function Keys overlay
Vinyl overlay imprinted with international symbols

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

Handset with Finger Rest

Select Key

Menu Key

LCD Display
79 x 134 pixels, monochrome

Custom Buttons
12 custom buttons with tri-color indicators can be configured as call appearances, monitored extensions, bridged call appearances, or programmed feature keys.

Audio Control Keys
Volume button controls handset, headset, speaker, and ring volume. Headset, mute, and speaker keys illuminated when functions are active.

Headset Jack

Speaker
Delivers high quality wide-band sound.

Dial Pad

Microphone

Handset Jack

Your Phone's Display

Your ShoreTel IP phone displays 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.

ShoreTel 212k Interface

4:39pm	03/27
John212	Standard
1856	Line 1
Dave	Line 2
Pickup	Line 3
Park	Line 4
Unpark	
Page	Flash

Call Handling Mode

Custom Key Labels
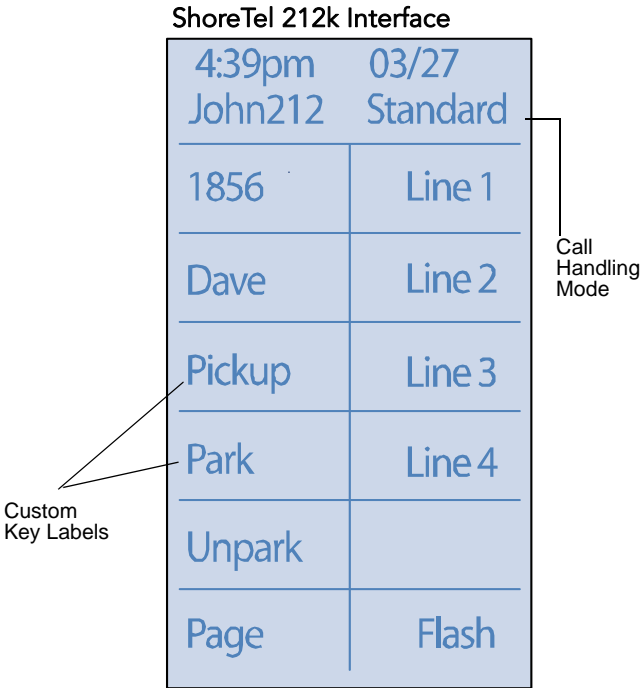
In the idle state, the first row of your phone displays the time and date. This information scrolls to display the system name.

The second row displays the number of missed calls, voice messages and agent state. This information scrolls to display the user's name and call handling mode.

Guide to Status Icons

Your ShoreTel 212k IP phone offers the following icons to help indicate the operational state of the device.

Unheard Voice Messages

Missed Calls

Logged Into Workgroup

Logged Into Workgroup (In Wrap-Up)

Logged Out of Workgroup

Redial Last Dialed Number

Redial Last Received Number

Redial Last Missed Number

LED Color Guide for ShoreTel 212k Custom Buttons

The table below provides information about the LED colors and blink patterns associated with the various operational states. Values shown in the table below apply to ShoreTel 6.1 (build 11.15.2603.0) and higher.

LED Color and Blink Pattern	State
Call Appearance States	
Off	Idle
Orange Steady on	Idle and DND
Off	Idle and Message Waiting
Orange Steady on	Idle, Message Waiting and DND
Green Steady on	Off Hook
Green Steady on	Active Call

LED Color and Blink Pattern	State
Green Steady on	Active Conference Call
Green Steady on	Remote Hold
Green 1000ms on, 1000ms off	Offering Call
Orange 250ms on, 250ms off	Held or Parked Call or Conference Call
Red Steady on	Whisper Page Call
Red Steady on	Active Call Whisper Muted
	Extension Monitor States
Off	Idle
Orange Steady on	Idle and DND
Off	Idle and Message Waiting
Orange Steady on	Idle, Message Waiting and DND
Green 1000ms on, 1000ms off	Offering Call
Green Steady on	Active Call Picked Up
Orange 250ms on, 250ms off	Held or Parked Call or Conference Call
Red Steady on	Monitored Ext. on Active Call
Red Steady on	Monitored Ext. on Conference Call
Green 200ms on, 100ms off, 700ms on, 1000ms off	Monitored Ext on active Call + Offering Call

LED Color and Blink Pattern	State
Green 800ms on Orange 200ms on	Picked up Monitored Ext. Call + Monitor Ext on Active Call
Orange 200ms on, 100ms off, 200ms on, 500ms off	Picked up Monitored Ext. Call and Held + Monitor Ext on Active Call
Orange 200ms on Green 800ms on Orange 200ms on Green 100 on	Picked up Monitored Ext. Call + Monitor Ext held Active Call
Bridged Call Appearance States	
Off	Idle
Green 1000ms on, 1000ms off	Offering Call
Green Steady on	Active Call Picked Up
Red Steady on	Line In-Use
Orange 250ms on, 250ms off	Held or Parked Call or Conference Call
Feature Key With Extension Target States	
Off	Idle or Offering Call
Red Steady on	Connected or Held Call
Orange Steady on	DND
Red Steady on	(Dial/Transfer Mailbox Only) MWI
Green 1000ms on, 1000ms off	(Pickup, Pick/Unpark, Pickup NightBell Only) Offering

LED Color and Blink Pattern	State
Orange 250ms on, 250ms off	(Unpark, Pick/Unpark Only) Held/Parked
	Toggle Functions (Record, Whisper Mute)
Off	Function Off
Orange Steady on	Function Available
Orange 500ms on, 500ms off	Record Active
Orange 500ms on, 500ms off	Whisper Mute Active

LOGGING IN

If you are using your phone for the first time and no extension has been assigned, the phone's display shows "Available." You can place calls but not receive them. You need to log in, change your password, record your name, and assign your extension to this phone. To log in:

Step 1   Press Voice Mail button.

Step 2   Enter the extension number assigned to you by your system administrator.

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

Step 4   Enter a new password followed by #. Check with your system administrator for password length. Repeat to confirm password.

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

    # Accept

    1 Review

    2 Re-record

    3 Delete

    * Cancel

Step 6   To assign your extension to this phone, press 7 for voice mail options, and then press 3 to re-assign the extension. Then, press 1 to confirm assignment.

You are now logged in. Your phone can receive calls, and you can check for new messages. With appropriate permissions (granted by your system administrator), you can log into any ShoreTel IP phone on your network to assign your extension to that phone.

Your extension number now appears on the display, next to the first custom key. The time and date appear at the top of the display, and an abbreviated version of your name appears on the second line. Your full name scrolls across the display, along with information about your Call Handling Mode and the system name.

MANAGING CALLS – BASIC FEATURES

Placing Calls

Using the Handset

To place an internal call, pick up the handset and enter the extension. To place an external call, enter the trunk access code, then the phone number.

To end a call, hang up the handset.

Using the Speakerphone

To place an internal call, press the Speakerphone button ⏚ and enter the extension. To place an external call, enter the trunk access code, then the phone number.

To end a call, press the Speakerphone button ⏚ again.

Using the Headset

To place an internal call, press the Headset button ⏚ and enter the extension. To place an external call, enter the trunk access code, then the phone number.

To end a call, press the Headset button ⏚ again.

The figure below shows the information that appears on your ShoreTel 212k IP phone when an outbound call is placed.

Outbound call: ShoreTel 212k

Walker, John — Call Recipient's Name	
6851 — Call Recipient's Extension	
1856	Line 1
Dave	Line 2
Pickup	Line 3
Park	Line 4
Unpark	
Page	Flash

Answering Calls

Ring tones and the flashing red LED light in the top right corner of your phone identify an incoming call. A double ring signifies an internal call while a single ring indicates an external caller. The caller's name and number may appear on your display if the information is available.

Inbound call: ShoreTel 212k

Page, Jimmy	
(408) 555-1212	
1856	Line 1
Dave	Line 2
Pickup	Line 3
Park	Line 4
Unpark	
Page	Flash

Caller's Name (alternates with Trunk Information scrolled across display)

Caller's Number

To answer the call, do one of the following:

Using the Handset

To answer a call, pick up the handset when the phone rings.

To end a call, hang up the handset.

Using the Speakerphone

To answer a call, press the Speakerphone button ⊲◯. The LED lights green.

To end a call, press the Speakerphone button ⊲◯ again.

Using the Headset

To answer a call, press the Headset button ⌒◯. The LED lights green.

To end a call, press the Headset button ⌒◯ again.

Sending a Call to Voice Mail

When an incoming call arrives, you can press the Menu button [ ] which will cause the following menu to appear:
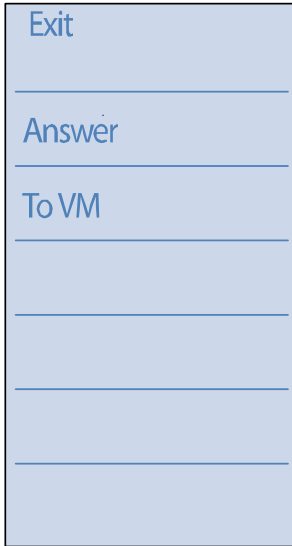
Press the custom button next to the **To VM** soft key to send the caller directly to your voice mailbox. Alternatively, you can press the Menu button [ ] to return to the previous display.

Diverting a Call

You can send an incoming call to another extension or to an outside number without answering it.

Step 1   Press the Transfer button [Transfer].

Step 2   Enter the number, or press the extension's custom key.

Step 3   Wait for the timeout period to expire, or simply hang up the handset, to complete the transfer to an extension.

Answering Additional Calls

With the appropriate permissions (set by your system administrator), your 212k phone can receive up to 12 incoming calls at once simply by pressing one of the custom buttons which has been programmed for a call appearance. If you receive an incoming call while you are on the phone, you can press the custom call appearance key to answer the incoming call, and the current call will automatically be put on hold.

Transferring a Call

To transfer a call from your extension to another number:

Step 1   Press the Transfer button [Transfer]. The call is put on hold.

Step 2   At the prompt, dial the number (or press the extension's custom key, or use the Directory to find the party).

    a   Complete a blind transfer by hanging up or by pressing the **Transf** soft key.

    b   Speak to the recipient before transferring. After consultation, press the **Yes** soft key to complete the transfer, or press the **No** soft key to abandon the transfer and return to the original call.

Making a Conference Call

To conference a party into a connected call:

Step 1   Press the Conference button [Conference]. The call is put on hold.

Step 2   Enter the extension of the party you would like to conference.

Step 3   When the far end answers, you can consult with the party and press the "Yes" soft key to complete the conference. Otherwise, press the "No" soft key to disconnect the party you added and to return to the original call.

You can list the conference call participants by pressing the Menu button ▭ (List). To drop one of the parties, press the associated button for that party and confirm with "Yes" to drop the party or "No" to return to the list.

With the appropriate permissions (set by your system administrator), you can conference up to six parties in a single call.

Using the Intercom

The Intercom function allows you to connect with another party without ringing the party through a call line. To use this feature, you must have the appropriate permissions (set by your system administrator). The recipient must be using a ShoreTel IP phone. To intercom another party:

Step 1   Press [Intercom].

Step 2   Enter the party's extension, or press the custom key associated with the extension.

Step 3   To end the call, press the Speakerphone button 🔊.

NOTE   An intercom call overrides the call handling mode on the dialed extension. This allows you to intercom even when the dialed extension is forwarded always to voice mail.

Placing a Call On or Off Hold

To place a call on hold, press the Hold button [Hold], or press the call's custom key, if available. On the ShoreTel 212k phone, the custom key blinks green, at which point you can safely place the handset on hook (or press the speaker or headset button) without ending the call. To take the call off hold, press the custom key with the blinking green LED, or press the Hold button [Hold] again.

If you are not on another call while a call is on hold, you will hear a reminder ring in 15 seconds and at one-minute intervals after that. If you have received several calls, you will receive a reminder ring for the call that has been on hold the longest.

If you have multiple calls on hold, you can press the green blinking LED associated with the call that has been placed on hold to answer that call.

Redialing and Checking Missed Calls

You can use the Redial function to dial not only the last number you called, but the last several calls you made or received, including those you missed, which are denoted by the ⛎ icon. To redial a call:

Step 1 Press 〔Redial〕. Press it again to dial the last number you called.

or

Press the Redial button 〔Redial〕 to display a list of previously dialed numbers, as shown below.

ShoreTel 212k Redial Interface

Asterisk indicates last dialed number

Pressing Show button displays date and time number was dialed

Press to page up through previous numbers

Press to page down through previous numbers
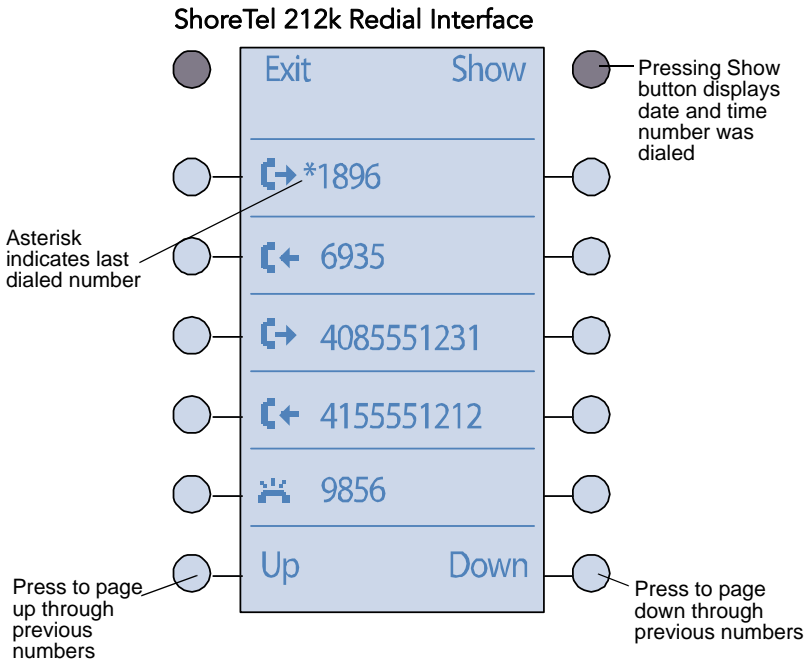
Press the custom button to the left of the number you want to dial. The custom buttons to the right of the number are disabled when the redial menu is active.

You can press the Select button ◁ (Show), followed by one of the custom buttons next to a phone number to display the date and time that call was placed, received, or missed. Alternately, you can press the Menu button ▭ to exit.

You can also press the custom buttons associated with the **Up** and **Down** soft keys to scroll through dialed numbers, one page at a time.

AUDIO CONTROLS

Adjusting 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.

Adjusting Handset Volume

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

Adjusting Headset Volume

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

Adjusting 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 button again.

VOICE MAIL

A steadily flashing light on your phone's upper right corner, as well as stutter dial tone, signifies that you have unheard messages. The number of unheard messages appears on the idle screen of your phone's display by the icon 🔳.

Logging Into the Main Menu

To log in to the main voice mail menu, press the Voice Mail button [Voice Mail], then enter your password followed by [#]. (Your default password is 1234.)

Logging In from Another Extension

To log in to the main voice mail menu from another extension, press the Voice Mail button [Voice Mail], followed by [#], then your extension, followed by your password, and then [#].
To log in to the main voice mail menu from an analog phone, press [#] [#], then your extension, followed by your password, and then [#].

Logging In from an External Phone

To log in to the main voice mail menu from an external phone, dial the voice mail access number provided by your system administrator, press [#], then your extension, then your password followed by [#].

[1] Listening to and Interacting with New Messages

From the Main Menu, you can listen to and replay new messages by pressing [1]. To interact with new messages, press one of the following:

[1] Replay the message

[2] Save the message

[3] Delete the message

[4] Forward the message

After recording the prefacing remark, press:

[#] If correct

[1] Review

[2] Re-record

[*] Cancel recording

After addressing the message, press [1] to mark it urgent, or simply hang up to send the message.

[5] Reply to the message

Choose one of the following options:

[1] Reply with a voice message

[2] Reply with a call back

[*] Return to the previous menu

[6] Hear envelope information (time and date sent)

[7] Move backward

While listening to a message, you may "rewind" to several seconds earlier in the message.

[8] Pause

[9] Move forward

While listening to a message, you may "fast forward" to several seconds later in the message.

[0] Followed by [0] to Transfer to Assistant

While listening to a message, you may contact the assistant to inquire or share information about a voice mail.

[#] Continue to next message

[*] Cancel message review

[2] Sending Messages from Voice Mail

From the Main Menu, you can send messages by pressing **[2]**. The following options are available while recording your message:

[*] Cancel

[#] Done recording

[1] Review

[2] Re-record

After you are satisfied with your recording, you will be prompted to enter the recipient's extension. At this time, you have the option to press:

[0] Additional addressing options

> **[1] Look up recipient by name in a directory**
>
> **[2] Specify a personal distribution list**
>
> **[3] Broadcast to all extensions**
>
> **[*] Cancel addressing options**

After the message is addressed, if desired, you can press:

1 **Mark / unmark urgent**

2 **Request return receipt**

3 Listening to Saved Messages

From the Main Menu, you can listen to saved messages by pressing **3** . To interact with saved messages, press any one of the options under "Listening to and Interacting with New Messages" on page -19 (except for option 2).

7 Mailbox Options

Press **7** to access various options for your personal mailbox, then press one of the following:

1 Record personal greeting

NOTE When you record a personal greeting, it is linked to the current active call handling mode.

Record your personal greeting for the current active call handling mode at the tone and press **#** , then select from the following options:

Accept

1 Review

2 Re-record

3 Delete

* Cancel

2 Choose call handling mode

For more information on call handling, see "Changing Call Handling Mode and Forwarding" on page -25. The following modes and options are available:

1 Standard

2 In a Meeting

3 Out of the Office

4 Extended Absence

5 Custom

* Cancel

3 **Reassign extension**

If you have the proper permission, you can assign your extension to any phone. The following options are available:

1 Assign the extension[1]

2 Unassign the extension (The phone reverts to the extension originally assigned to it.)

3 To assign to your extension to your last external number.

4 **Set your password**

Enter your new password, followed by **#** and repeat to confirm. Press ***** to cancel.

5 **Disable or enable envelope information**

Use this option to turn on/off the envelope information which contains the date/time of the message, caller ID and/or the recorded name of the person who left the voice mail message.

6 **Record your name**

Press **#** when you are finished recording your name, then choose from the following options:

Accept

1 Review

2 Re-record

3 Delete and use default system recording

* Cancel

7 **Listen to your deleted messages**

As a safeguard against accidental erasures, the system retains deleted messages for a few hours. To listen to your deleted messages, press **7** . Voice mail plays all the deleted messages still available to the system. During playback, you can manage deleted messages as if they were newly arrived messages. Press **2** to restore the deleted message to a saved message.

8 **Remove deleted messages**

---

1. If you assign your extension to a phone that is normally occupied by another user, calls to the original user's extension will go to the forwarding destination as defined by their active Call Handling Mode.

The following options are available:

1 Confirm

* Cancel

9 **Additional options**

The following additional options are available:

1 Enable or disable Outlook automated call handling

2 Change e-mail delivery options

> **1** Disable e-mail delivery
>
> **2** Enable e-mail delivery
>
> **3** Enable e-mail delivery with voice message attached
>
> **8** Mark voice mail heard after e-mail delivery

3 Change agent state
(See "Changing the Agent State" on page 31.)

> **1** Log in and assign extension
>
> **2** Log out
>
> **3** Log in without assigning extension

5 Change Find Me forwarding state

> By enabling Find Me, callers who are routed to your voice mail box can be instructed to press 1 and the voice mail system will call you at one of two possible numbers where you can be located. To set the Find Me destinations, use Personal Call Manager or Web Access.
>
> **1** Enable
>
> **2** Disable

* Previous menu

* **Cancel current operation**

8 **Log Off**

9 **Return to Auto-Attendant**

0 **Transfer to Assistant**

**Hear Mailbox Status**

Select this option to hear the number of unheard messages.

Leaving a Message and Message Options

When your call is sent to voice mail, you may leave a message when prompted, or you can use one of the following options while listening to the mailbox greeting:

`#` Bypass greeting and leave a message, then hang up to send it.

`0` Transfer to assistant.

`1` Forward to recipient's Find Me destination (an optional number where calls can be forwarded) — if enabled; otherwise you will be prompted to record a message.

`9` Transfer to auto-attendant.

After message recording, select from one of the following options:

`#` Message Options, then:

> `#` Send message
>
> `*` Cancel
>
> `1` Review
>
> `2` Re-record
>
> `3` Mark / unmark urgent
>
> `9` Transfer to auto-attendant
>
> `0` Transfer to assistant

`*` Re-record

`0` Send message, transfer to main menu

`1` Send message, forward to recipient's Find Me destination, if enabled

`9` Send message, transfer to auto-attendant

NOTE Hanging up sends the message.

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OPTIONS

You can manage various options on your 212k by pressing the options button and entering your password. You can configure your call handling mode, automatic off-hook preference, ring tone, programmable keys, agent state as well as handsfree mode. Pressing the **Options** button, followed by your password and ▇ displays the following screen:

Exit
Options:

Call Handling

Auto Off-Hook

Change Ring

Program Keys
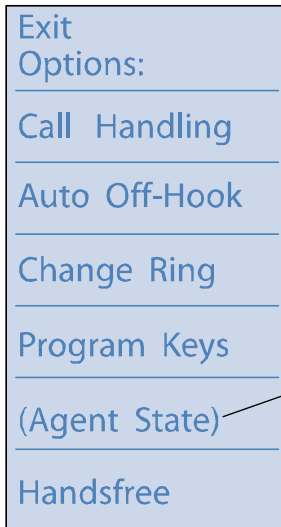
(Agent State) ← Appears in parentheses because user does not have permission to use this feature

Handsfree

Changing Call Handling Mode and Forwarding

NOTE Use Personal Call Manager or Web Access to configure the modes with different call forwarding destinations and personal greetings.

You can set one of five distinct call handling modes for your extension, including four "Do Not Disturb" options to forward incoming calls or send them to voice mail. You can record personal greetings, which are linked to the active call handling mode.

By default, your phone is set to Standard mode, which allows you to answer all incoming calls. Other mode options include In a Meeting, Out of Office, Extended Absence, and Custom.

You can use the Options button ▇ to select the desired mode by doing the following:

Step 1 Press the Options button ▇, followed by your password and then ▇, or the soft key **Enter** to display the following screen:

Asterisk indicates this is currently selected mode

```
Exit
Call  Handlng:

*In Meeting       ▲

Out Office        ▲

Extd Absnc        ▲

Program  Keys     ▲

Custom            ▲
```

Step 2 Press the custom key to the left of **Call Handling**.

Step 3 Press the custom key to the left of the desired call handling mode.

or

Change the **Call Forward Always** or **No Answer** destination by doing the following:

a Press the custom button on the right.

b Press the Select button ◁ (Back) to backspace over the current setting.

c Enter the new destination, followed by the custom button associated with **Enter**.

Step 4 Press the Menu (Exit) button ☐ to exit.

Alternately, you can select a different mode by logging into voice mail and pressing **7** for Additional Options. Then, press option **2** and follow the prompts. See "Mailbox Options" on page -21 for more information.

Changing Automatic Off Hook Preference

ShoreTel users who frequently use a headset may want to use the Automatic Off Hook Preference feature to select which audio path (speakerphone or headset) is automatically activated when placing or receiving calls. You can control the call activity with PCM.

This feature also provides better notification for incoming calls by generating a call-waiting tone when the default audio pathway is set to Headset and the headset is enabled. In addition, the IP phone rings at normal volume if the headset is disabled.

To configure the Automatic Off-Hook Preference feature, follow the procedure below:

Step 1   Press the Options button ^{Options}, followed by your password and then `#`, or the soft key **Enter**.

Step 2   Press the custom key to the left of the **Auto Off-Hook** to display the following screen:

Exit
Auto Off-Hook:
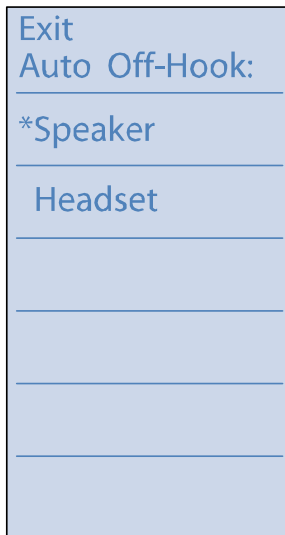
*Speaker

Headset

Step 3   The current setting is indicated with an asterisk. Press the custom key next to **Headset** to change to headset or press the custom key next to **Speaker** to change to change to Speaker.

Step 4   Press the Menu button ☐ to exit.

Changing Ring Tone

You can set your IP212k phone to ring with one of four different ring tones. By default, your phone is set to the Standard ring tone.

You can use the Options button [Options] to select the desired ring tone by doing the following:

Step 1   Press the Options button [Options], followed by your password and then [#], the soft key **Enter**.

Step 2   Press the custom key to the left of **Change Ring** to display the following screen:

Exit
Change Ring:

*Standard 🔊

Ring 2 🔊 ← Press the button to the right of this icon to hear the ring tone.

Ring 3 🔊

Ring 4 🔊

Step 3   Press the custom key to the right of each ring tone to hear each ring tone.

Step 4   Press the custom key to the left of the desired ring tone to select it.

Step 5   Press the Menu button ☐ to exit.

Programming Your Custom Buttons

You can program the custom buttons on your IP 212k phone as shortcuts to operations that would normally require pressing two or three buttons to accomplish the same task.

After a function is assigned to one of the 12 custom buttons, you can enter a label of up to six characters, and this label appears on the LED display next to the custom button.

To program the custom buttons on your IP212k phone, follow the procedure below:

NOTE Contact your system administrator to verify that you have permissions to configure the programmable buttons on your phone.

Step 1 Press the Options button [Options], followed by your password and then [#], the soft key **Enter**.

Step 2 Press the custom key to the left of **Program Keys** to display the following screen:

Cancel
Select Buttn:
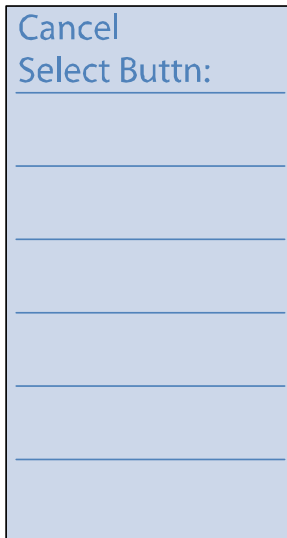
Press one of the custom buttons to assign a function to that button. (Do not press the Menu or Select buttons at the top.)

Step 3 Press one of the 11 available custom buttons (the top one is reserved for call appearance) to select the button to which you will assign a specific function. The following screen appears:

Exit

Select:

Call

Dial Number

The word "Call" toggles with the word "Appearance" due to limitations on the number of characters that can be displayed.

Only Call Appearance and Dial Number (i.e. Speed Dial) functions are available from the phone interface. Contact your system administrator if you want access to other programmable button functions.

Step 4   Press the custom key to the left of the function you would like to assign to this key.

NOTE Many functions can be assigned to your custom buttons by your system administrator via ShoreWare Director. However, your choices are limited to just **Call Appearance** and **Dial Number** (i.e. Speed Dial) when programming the buttons via the 212k interface. To program one of the other functions to your custom buttons, please contact your system administrator.

Step 5   Enter the extension, if applicable, and press the custom key next to **Enter**. If you are entering an external number, note that it must be entered in canonical format – this means you must enter a **+** symbol, followed by a **1**, and then the 10-digit number. For instance, to call a U.S. number: +14085551212.

Step 6   You can enter a label up to six characters long by pressing the custom key next to **A -> a1** (this shifts the key pad to alphabet mode).

NOTE When in alphabet mode, press the appropriate key on the dial pad multiple times to scroll through the alphabet letters associated with that key. Example: For the letter 'C' you would press the #2 digit three times on the dial pad.

Step 7   Press the custom key next to **Enter** when finished.

Step 8   Press the Menu button ▭ to exit.

Changing the Agent State

If you are a member of a workgroup and you need to log into the workgroup at the start of your day, or log out to take a break, you can change your agent state via the IP 212k interface.

Note that the Agent State option is only available if your PCM client type is one of the following: **Workgroup Agent**, **Workgroup Supervisor**, or **Operator**.

To change the agent state on your IP 212k phone, follow the procedure below:

Step 1 Press the Options button ⬚ᵒᵖᵗⁱᵒⁿˢ, followed by your password and then ⬚#, or the soft key **Enter**.

Step 2 Press the custom key next to **Agent State**. If the words appear in parentheses, that means you do not have the proper permissions. If you need access, contact your system administrator to request a change to your client type.

The following screen appears:

```
Exit
Agent State:
─────────────
*Logged In
─────────────
 Logged Out
─────────────
 Wrap-Up
─────────────


─────────────


─────────────

```

Step 3 Available options for agents are **Logged In**, **Logged Out**, and **Wrap-Up**. The current state is indicated with an asterisk. Press the custom button next to the desired state.

Step 4 Press the Menu button ⬚ to exit.

Enabling or Disabling Handsfree Mode

Handsfree mode is for analog telephone users who are using headsets. IP phone users should instead choose the Auto Off-Hook Preference. See "Changing Automatic Off Hook Preference" on page -27 for more information.

With handsfree mode enabled, you can place or receive calls by using a headset or the speakerphone. By default, handsfree mode is disabled. You can enable handsfree mode by doing the following:

Step 1   Press the Options button ⬛^{Options}, followed by your password and then ⬛, or the soft key **Enter**.

Step 2   Press the custom key next to **Handsfree** to display the following screen:

```
Exit
Mode:
_____
*Disabled
_____
 Enabled
_____

_____

_____

_____
```
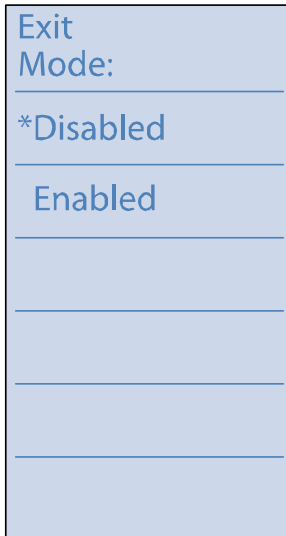
Step 3   Available options for Handsfree mode are **Disabled** and **Enabled**. The current state is indicated with an asterisk. Press the custom button next to the desired option.

Step 4   Press the Menu button ⬛ to exit.

NOTE If you enable Handsfree mode, you will not hear dial tone on your phone.

DIRECTORY

You can use the Directory to find internal extension numbers on your network by pressing the Directory button ⬚ , to display the following:

ShoreTel 212k Directory Interface

Exit	Back
Name:	
Mike T	
Hershel W	
Billy C	
Marketing 01	
Sales 04	
Up	Down

To limit the search results, start spelling the person's name using the keypad. Use ✱ to enter a wildcard character and # to enter a space.

You can also press the custom buttons associated with the **Up** and **Down** soft keys to scroll through dialed numbers, one page at a time.

When you have located the desired name or number, press the associated custom button to dial the number. Alternately, you can press the Menu (Exit) button ⬚ to exit.

MANAGING CALLS – ADVANCED FEATURES

In addition to performing the regular functions of placing calls and answering calls, your phone supports several other advanced functions. If you use any of these features on a regular basis, you may benefit by having your system administrator assign the desired function to one of the custom buttons on your phone.

Programmable Custom Buttons

The 212k IP phone has eleven custom buttons that can be programmed with different functions. The system administrator can configure the custom buttons via ShoreWare Director on behalf of a user or can enable permissions for an individual user so that the user can modify the custom buttons on the IP phone via the telephone interface.

NOTE IP 212k users can only program Call Appearance or Dial Number (Speed Dial) from their telephone interface. Other features must be programmed by your system administrator via ShoreWare Director.

The list below contains the different functions that can be assigned to the buttons of a phone, allowing you to create shortcuts for operations that would normally require pressing two or three buttons.

- **Barge In –** Barge In allows users with proper permission to enter into an existing call. This feature is useful for certain users including operators, executive assistants, trainers, and ACD supervisors that must enter calls for important business reasons. A custom key can be programmed to invoke the barge in feature as well as optionally include a specific extension for quick, one-touch feature operation. If you need this feature, please review with your system administrator.
- **Bridged Call Appearance –** Bridged Call Appearances shares call appearance information across many separate IP phones, offering the benefit of faster call handling between users. The feature is intended for key system environments (small offices or branch offices), such as an auto dealership or small bank with 4 trunks and 8 IP phones. Please refer to "Bridged Call Appearances" on page -37 for more information about managing calls using Bridged Call Appearances.
- **Call Appearance –** Call appearance represents a phone call on your extension. Please refer to "Answering Additional Calls" on page -15 for more information about managing calls on your extension.
- **Conference Blind –** The ShoreTel system allows you to conference up to three parties (six depending on configuration) without having to consult with each new party before they enter the conference call. Please see "Making a Conference Call" on page -15 for more information.
- **Conference Consultative –** The ShoreTel system allows you to conference up to three parties (six depending on configuration) allowing you to consult with each new party before they enter the conference call. Please see "Making a Conference Call" on page -15 for more information.

- **Conference Intercom** – The ShoreTel system allows you to conference up to three parties (six depending on configuration) allowing you to consult using the intercom with each new party before they enter the conference call. Please see section "Making a Conference Call" on page -15 for more information.
- **Dial Mailbox** – The ShoreTel system allows you to call another user's mailbox without ringing their phone. If you use this feature often, contact your system administrator about programming a custom key. A custom key can be programmed to invoke the dial mailbox feature as well as optionally include a specific mailbox for quick, one-touch feature operation.
- **Dial Number (Speed Dial)** – The ShoreTel system allows you to program custom buttons on your phone for speed dial, allowing you to dial an extension or an external number with one touch.
- **Intercom** – The ShoreTel system allows users with the proper permission to intercom other users on the system. When you intercom another user, instead of their phone ringing, the called party will hear a tone then you will be connected to their speakerphone. The dialed user must be using a ShoreTel IP phone for proper operation. In addition to the fixed function key, a custom key can be programmed to invoke the intercom feature with a specific extension for quick, one-touch feature operation. Please see "Using the Intercom" on page -16 for more information.
- **Monitor Extension** – The ShoreTel system allows users with proper permission to monitor the extension of another user. This helps manage incoming calls for that extension, and it also serves as a shortcut when performing one of the following functions: dialing that extension, transfer, conference, call parking, call pickup and intercom to that extension. Please see "Extension Monitoring" on page -38 for more information.
- **Page** – The ShoreTel system allows users with proper permission to access the overhead paging system or page a group of ShoreTel IP phones. Dial the appropriate number given by your system administrator and wait for the confirmation tone, and then begin speaking. The message will be broadcast over the on-site loudspeaker or through the speakers of the IP phones. Please see "Overhead Paging" on page -40 and "Using Group Paging" on page -40 for more information.
- **Park** – The ShoreTel system allows users to park a connected call on another extension. Please see "Parking and Unparking Calls" on page -40 for more information.
- **Park and Page** – This also allows a user to park a call and simultaneously do an overhead page.
- **Pickup** – The ShoreTel system allows users with proper permission to pick up a ringing extension.
- **Pickup Night Bell** – The ShoreTel system allows calls to route to an extension that will ring on an overhead speaker. This feature can be convenient for off-hours when a caller needs to speak with anyone at a site.
- **Pickup/Unpark** – The ShoreTel system allows users to park a connected call on another extension, or unpark the call after it has been parked.

Please see "Parking and Unparking Calls" on page -40 for more information.

- **Record Call –** The ShoreTel system allows users with proper permission to record active calls they are currently on. This feature is useful for certain users including writers, interviewers, sales people, lawyers that must record calls for important business reasons. A custom key can be programmed to invoke the record feature for quick, one-touch feature operation. If you need this feature, please review with your system administrator.
- **Record Extension –** The ShoreTel system allows users with proper permission to record an active call on another extension. This feature is useful for certain users including ACD supervisors that must record calls for important business reasons. A custom key can be programmed to invoke the record feature as well as optionally include a specific extension for quick, one-touch feature operation. If you need this feature, please review with your system administrator.
- **Send Digits Over Call –** The ShoreTel system allows users to send a preconfigured set of DTMF tones out a trunk during a call. This feature is useful to quickly navigate external IVR systems as well as external systems requiring an account code. A custom key can be programmed to invoke the send digits feature as well as include desired digits to be sent for quick, one-touch feature operation. If you need this feature, please review with your system administrator.
- **Silent Monitor –** The ShoreTel system allows users with proper permission to silently monitor a call on another extension. This feature is useful for certain users including ACD supervisors that must monitor calls for important business reasons. A custom key can be programmed to invoke the silent monitor feature as well as optionally include a specific extension for quick, one-touch feature operation. If you need this feature, please review with your system administrator.
- **Transfer Blind –** The ShoreTel system allows you to transfer a call to another party without having to consult with that party before completing the transfer. Please see "Transferring a Call" on page -15 for more information.
- **Transfer Consultative –** The ShoreTel system allows you to transfer a call to another party allowing you to consult with that party before completing the transfer. Please see "Transferring a Call" on page -15 for more information.
- **Transfer Intercom –** The ShoreTel system allows you to transfer a call to another party allowing you to consult with that party using intercom before completing the transfer. Please see "Transferring a Call" on page -15 for more information.
- **Transfer to Mailbox –** The ShoreTel system allows you to transfer a call directly to another party's mailbox.
- **Transfer Whisper –** The ShoreTel system allows users with the proper permission to transfer a call to another party allowing you to consult with that party using whisper before completing the transfer.

- **Unpark** – The ShoreTel system allows users to unpark a connected call from another extension. Please see "Parking and Unparking Calls" on page -40 for more information.
- **Whisper Page** – The ShoreTel system allows users with the proper permission to enter a call on another extension and whisper just to that one party. The third party on the call cannot hear the whisper. The destination party has the option to talk back to you privately using the whisper mute feature.
- **Whisper Page Mute** – If you receive a whisper page, you can speak privately back to the person using the whisper page mute feature.

Bridged Call Appearances

Bridged Call Appearances (BCA) is a feature that can be assigned (by your system administrator) to a custom button on your phone. BCA provides "bridged" information between many separate IP phones, offering the benefit of faster call handling between users. The feature is intended for key system environments (a small office or branch office), such as an auto dealership or small bank with 4 trunks and 8 IP phones.

A custom button on each IP phone is configured for BCA so that when an *inbound* call arrives, that custom button blinks green on all of the phones. If someone answers the call, the LED on that person's phone becomes solid green while the custom button on all of the other IP phones that have been programmed with that BCA extension turns red. In this way, the call appearance information is shared (or bridged) across the many different phones in an organization.

You can place an outbound call using a bridged call appearance so others users can view the call activity. To place an outbound call, press the bridged call appearance, dial the trunk access code and then dial the number. When an outbound call is placed, the LED on the outbound caller's phone becomes solid green, and the associated button on all of the other phones become solid red. If the call is placed on hold, the associated LEDs on all phones blink green. A button can be programmed for each position in the call stack.

NOTE Pressing the top-most BCA custom button for outbound calls does not necessarily access trunk 1. There is no one-to-one correlation between the custom buttons programmed for BCA extensions and a particular trunk. Trunks can be associated with BCA extensions in any random manner desired by the system administrator.

Another benefit of the BCA feature is that an outbound caller-id can be associated with that button (configured by the system administrator). The following rules determine which caller-id is displayed when an outgoing call is made using BCA:

- Outbound to an internal extension – the name and number of the user that initiated the BCA call will be used, and if that user is a "private" user, then the caller-id is blank.

- Outbound to an external number – the caller-id will be used in following order, based on availability:
  - Outbound caller-id configured for that BCA
  - DID number configured for that BCA
  - External identification or caller-id number of the user that initiated the BCA call
- Outbound to an external emergency number (such as 911) – the emergency identification or a CESID number of that user will be sent.

For more information about Bridged Call Appearances, see your system administrator. The system administrator can configure your bridged call appearances to deliver Caller ID on inbound call, display Caller ID on active calls, as well as turn on, turn off or delay the ringing on inbound calls.

Silent Monitor / Barge In

With the appropriate permissions (set by your system administrator for both your phone and the target phone), you can listen to a call without being heard, or join a call as a fully conferenced participant ("barge in").

- To silently monitor a call, enter 【*】【1】【7】, then the extension on which the call is active.
- To barge in on a call, enter 【*】【1】【6】, then the extension on which the call is active.

NOTE If you use the Silent Monitor and Barge In features often, you should have your system administrator configure a custom key to provide one-button operation. See "Programming Your Custom Buttons" on page -29 for more information.

Extension Monitoring

A monitored extension is a custom key (set by your system administrator) that helps you manage incoming calls for that extension. It also serves as a shortcut when performing one of the following functions: dialing that extension, transfer, conference, call parking, call pickup and intercom to that extension. Additionally, you can see when the monitored extension has unheard messages by the ▄▄▄ icon.

Answering a Monitored Extension's Call

The custom key LEDs provide visual cues and you will hear a different ring when a call comes in. If a call comes in while you are already on a call, you will hear a higher pitched call waiting tone.

You can pick up the call while it is ringing by pressing the custom key or by pressing the **Answer** soft key. You can send it to the monitored extension's voice mail by pressing **To VM**. You can also answer a call after the owner of the monitored extension has put it on hold by pressing the **Pickup** soft key.

When you put a call that has come in to the monitored extension on hold, the call is parked on the owner's phone, so that either of you may pick up the call again.

The system administrator can configure your monitored extensions to deliver Caller ID on inbound call, display Caller ID on active calls, turn on, turn off or delay the ringing on inbound calls.

Whisper Page

With the appropriate permissions (set by your system administrator for both your phone and the target phone), the Whisper Page feature lets you break into an active call in order to speak with an internal user. This occurs without the remote caller hearing the interruption and without you hearing the remote caller.

To issue a Whisper Page to another user who is on a call, enter [*] [1] [9] , plus the extension of that user. Note that the recipient must be on a ShoreTel IP phone (except the IP100). If a Whisper Page call is sent to any other phone (e.g., IP100, SoftPhone, or analog phone) the call will be treated as an intercom call.

NOTE   If you use the Whisper Page feature often, you should have your system administrator configure a custom key to provide one-button Whisper Page operation. See "Programming Your Custom Buttons" on page -29 for more information.

Picking Up the Night Bell

A night bell, when activated by your system administrator, allows calls to route to an extension that will ring on an overhead speaker. This feature can be convenient for off-hours when a caller needs to speak with anyone at a site.

If you have access to the night bell function (set by your system administrator), enter [*] [1] [4] to answer the call at your site.

If you hear an error tone when you try to pick up the night bell, the night bell may not be configured at your site or you may not have the necessary permissions. Contact your system administrator if this occurs.

NOTE   If you use the Night Bell feature often, you should have your system administrator configure a custom key to provide one-button Night Bell operation. See "Programming Your Custom Buttons" on page -29 for more information.

Toggling the Hunt Group Status

With the appropriate permissions, you can toggle the hunt group status from busy to not busy (or vice versa) by entering ⁎ 1 8 , plus the extension of the hunt group. This feature is especially useful when hunt group members are in a meeting or leave work early. If you are a member of more than one hunt group, you must enter the extension associated with the desired hunt group after entering the access code above.

Overhead Paging

If you have permission (set by your system administrator) to access the overhead paging system, enter the number given to you by your system administrator and wait for the confirmation tone, and then begin speaking. Hang up when you are finished.

If you hear an error tone when you try to page, paging may not be configured at your site or you may not have the necessary permissions. Contact your system administrator.

Using Group Paging

Similar to the paging feature, you can also send an audible message to a select group of users if the phones at your site have been configured for group paging. By dialing the paging group extension associated with those users, you can record a message that will be broadcast over the individual speakers of those users' ShoreTel IP phones.

To use this feature, enter the Group Paging Extension given to you by your system administrator and wait for the confirmation tone. After you hear the tone, begin speaking. Keep in mind that you are creating a recording that will be broadcast to the other members of the Paging Group. Hang up when you are finished recording.

Parking and Unparking Calls

With the appropriate permissions (set by your system administrator), you can park a connected call on another extension by doing the following:

Step 1 Answer the incoming call and press the Menu button ▭ .

Step 2 Press the custom key next to the word "Park" and then enter the extension where you want to park the call. At the end of the timeout period, or by hanging up, the call is automatically sent to that extension and you can hang up your phone.

If you use this feature often, you can have the Park feature assigned to one of your phone's custom buttons for ease of use.

To unpark the call from a different location:

Step 1   Press the Menu button ⬒ and press the custom key next to the word "Unpark," which appears on the display.

Step 2   Enter the extension number from which you want to unpark the call.

Step 3   Press the custom key next to the word "Enter."

NOTE If you use the Park or Unpark feature often, you should have your system administrator configure a custom key to provide one-button park operation. See "Programming Your Custom Buttons" on page -29 for more information.

CALL MANAGER SOFTWARE

In addition to using the telephone interface of your 212k IP phone to access the ShoreTel features, you can accomplish many of the same tasks with ShoreTel's Call Manager software. ShoreTel's Call Manager software provides a visual, information-rich interface for managing and controlling communications – both telephone calls and voice mail.

The user-friendly interface lets you access all of the features and functions of your ShoreTel IP phone system, including unified messaging, point-and-click call management, customizable call-handling, and visual voice mail from your Windows-based PC.

The software works in concert with your 212k IP phone to let you perform the following tasks:

- dial by name
- change the call handling mode
- open a SoftPhone session
- keep a 1000-line call history of inbound and outbound calls
- listen to their voice mails from the PC

Call Manager frees you from fruitless tasks like playing phone tag, looking up numbers, struggling to set up conference calls, or interacting with voice mail messages. Integrated presence eliminates phone tag by letting you know if a line is busy or if an employee has redirected calls to another destination – all before dialing. And a visual display of up to 16 callers lets you switch from one caller to another, transfer callers to another destination, or initiate a conference with a simple mouse click.

ShoreTel's Call Manager software comes in five flavors, each offering access to slightly different capabilities and feature sets:

- Personal Call Manager
- Advanced Call Manager
- Workgroup Agent Call Manager
- Workgroup Supervisor Call Manager
- Operator Call Manager

For more information about Personal Call Manager and what features are available to you, see your system administrator.

WEB ACCESS

ShoreTel Web Access is a browser-based interface by which users can manage personal options and settings from any web browser from anywhere in the world. Call handling details and notification settings can be managed securely and easily from anywhere.

For more information about web access and what features are available to you, see your system administrator.

TROUBLESHOOTING

Problem: Your system is notifying your callers that your mailbox has exceeded its limit and is unable to accept new messages.

Solution: The voice mail system includes recently deleted messages still residing in the mailbox in the total count.[2] If your mailbox is full, first purge any backlog of deleted messages:

> **Step 1** At the Main Menu prompt, press `7` .
>
> **Step 2** Press `8` to remove deleted messages.
>
> **Step 3** Press `1` to confirm deletion.

Problem: Your display reads "No Service."

Solution: Your phone is temporarily inoperable. Contact your system administrator.

Problem: No one can hear you when you talk on the speakerphone.

Solution: Check for objects (e.g. coffee cups, books, etc.) blocking the microphone. Also, you should check your volume settings.

Problem: Your display is blank.

Solution: You have no power. Ensure the network cable is connected to the LAN port on the phone and the appropriate network data port in your office space. Additionally, check to see if you have a local AC power adapter plugged in for your phone or if power is being supplied by a PoE switch on your corporate network. Contact your system administrator if this does not correct the issue.

Problem: You have no dial tone when you go off hook, but otherwise your phone is working normally.

Solution: You have activated "Handsfree Mode," which is a feature used by someone with an analog phone using a headset. See "Enabling or Disabling Handsfree Mode" on page -32 for information on how to turn this feature off.

---

2. The system will prompt you that your mailbox is full the next time you log into voice mail.

Problem: Your phone's display does not show the date and time.

Solution: Your phone cannot locate the time server. Contact the system administrator.

Viewing Phone Information

To view information about your phone, such as IP address, subnet mask, version, and MAC address, follow these steps:

Step 1 With the phone on hook, press the Mute button 🔇⃝.

The LED should *not* light and you shouldn't hear any tones; if this isn't the case, lift and replace the handset.

Step 2 Dial I-N-F-O on the keypad and then press [#] .

The following information is displayed and can be scrolled through by pressing [#] . You can press [*] at any time to exit:

- IP Address (DHCP)
- Subnet Mask
- Gateway
- Link Speed[3]
- FTP Server
- Media Gateway Controller (MGC) Server
- SNTP Server (IP address)
- 802.1Q VLAN ID setting
- Application File Name
- Boot File Name
- Config File Date
- Country
- Language setting
- Application Version
- Boot Version
- Model Number
- MAC Address
- Serial Number
- Hardware Version

---

3. Number reflects speed for both ports.

Rebooting Your Phone

To reboot your phone, follow these steps:

Step 1   With the phone on hook, press the Mute button 🔇◯.

The LED should *not* light and you shouldn't hear any tones; if this isn't the case, lift and replace the handset.

Step 2   Dial R-E-S-E-T on the keypad and then press [#]. Your phone reboots.

Adjust Display Contrast

You can adjust the contrast on the LED display by doing the following:

Step 1   With the phone on hook, press the Mute button 🔇◯.

The LED should *not* light and you shouldn't hear any tones; if this isn't the case, lift and replace the handset.

Step 2   Dial I-N-F-O on the keypad and then press [#].

Step 3   Press the left (**Con-**) and right (**Con+**) bottom custom buttons to adjust the display. Repeatedly pressing the right-most custom button increases contrast, while pressing the left-most custom button decreases contrast.

Step 4   When the contrast is at the desired level, press the [*] to exit.

QUICK REFERENCE OF COMMON STAR CODES

Park a call	`*` `1` `1` + ext.
UnPark a call	`*` `1` `2` + ext.
Picking Up a Remote Extension	`*` `1` `3` + ext.
Picking Up the Night Bell	`*` `1` `4`
Using the Intercom	`*` `1` `5` + ext.
Barge In	`*` `1` `6` + ext.
Silent Monitor	`*` `1` `7` + ext.
Toggling the Hunt Group Status	`*` `1` `8` + HG ext.
Whisper Page	`*` `1` `9` + ext.
Changing Call Handling Mode and Forwarding	`Voice Mail` + password + `#` + `7` `2`
Changing Extension Assignment	`Voice Mail` + password + `#` + `7` `3` `1`
Unassign Extension Assignment	`Voice Mail` + password + `#` + `7` `3` `2`
Assign Extension to External Number	`Voice Mail` + password + `#` + `7` `3` `3`

Office Anywhere Features

Transfer a call	`*` `*` + destination + `#` `#`
Conference a call	`*` `*` + destination + `*` `*`
Hold a call	`*` `*`
Hang up	`#` `#`
Access other star codes	`*` `*` + `*` ?? (from table above)+ ext.

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