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computer meets telephone

ShoreTel Communicator for IBM Sametime User Guide

Release 3.0

i•link

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Version Information

ShoreTel Communicator for IBM Sametime User Guide
Software release 3.0, document revision 2
August 2014

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CHAPTER

1

Getting Started

Overview

ShoreTel Communicator for IBM Sametime is a powerful and reliable collaboration and unified communications solution that combines the power of IP telephony and unified messaging with IBM's Sametime communications and collaboration tools.

ShoreTel Communicator for Sametime enhances Sametime Connect by making it easy to work with voice calls from your desktop. It provides features that are commonly available from your telephone and additional features that enable advanced communications.

Features to work with voice mail within Sametime Connect are also provided by ShoreTel Communicator for Sametime. This includes information on your voice messages and the ability to listen and reply to, create, and manage voice mails.

ShoreTel Communicator for Sametime Clients

The ShoreTel Communicator for Sametime plug-in works with the following IBM client applications:

■ Lotus Notes with embedded Sametime Connect (Sametime release 8.5.2 or 9)

■ Standalone Sametime Connect (release 8.5.2 or 9)

Installing ShoreTel Communicator for Sametime

ShoreTel Communicator for Sametime may already be installed on your system. If the plug-in is not installed, contact your system administrator on whether ShoreTel Communicator for Sametime will be automatically installed, or you need to install the plug-in manually.

The process for automatically installing ShoreTel Communicator for Sametime is the same for both Sametime clients. Manual installation of the plug-in differs for the Sametime Connect standalone client and Sametime Connect embedded in Lotus Notes.

Installing on a Standalone Sametime Connect Client

1. From Sametime Connect, choose **Tools** > **Plug-ins** > **Install Plug-ins**.

2. In the Install/Update dialog box, select the **Search for new features to install** option and then click **Next**.

3. Use the Install dialog box to search for and select the ShoreTel plug-in. Then click **Finish**.

   Your system administrator can provide information on how to locate the ShoreTel plug-in.

4. In the Search Results dialog box, expand the result to display the **ShoreTel Call Control Live Text Feature** and the **ShoreTel Call Control Feature**. Select both features and click **Next**.

5.   Accept the terms of the license agreement and click **Next**.

6.   In the resulting dialog box, click **Finish** to complete the installation.

7.   When asked for confirmation, choose to **install the plugin-in**. If you also select to **add the signer to your list of trusted signers**, you will not have to choose again during future updates.

8.   Confirm the installation of the plug-in by clicking **OK**.

9.   You are informed that you need to restart the Sametime Connect client. Click **Restart Now**.

When you next start Sametime Connect, the ShoreTel Communicator for Sametime plug-in appears as part of the Sametime application.

Installing for Sametime Connect Embedded in Lotus Notes

1.   Open with a text editor the **plugin_customization.ini** file.

     The plugin_customization.ini file is located on your computer at *%ProgramFiles%\IBM\ Lotus\Notes\framework\rcp*.

2.   Add the following line of text to the file and save the changes.

     ```
     com.ibm.notes.branding/enable.update.ui=true
     ```

3.   From Lotus Notes, choose **File** > **Application** > **Install**.

4.   Follow steps 2 - 8 from the section Installing on a Standalone Sametime Connect Client.

When you next start Lotus Notes, the ShoreTel Communicator for Sametime plug-in appears as part of the Sametime application.

Installing via Optional Plug-ins on a Standalone Sametime Connect Client

If your system administrator has set up the plug-in to be automatically provided as an optional plug-in, you do not have to search for the feature in order to install the plug-in. Instead, proceed as follows:

1.   From Sametime Connect, choose **Tools** > **Plug-ins** > **Check for optional Plug-ins…**.

2.   Follow steps 2 - 9 from the section Installing on a Standalone Sametime Connect Client.

When you next start Sametime Connect, the ShoreTel Communicator for Sametime plug-in appears as part of the Sametime application.

Automatic Installation on a Standalone Sametime Connect Client

If your system administrator has set up the plug-in to be automatically installed, Sametime Connect will automatically recognize new plugins within half an hour of them being installed on the server. The automatic installation process will then begin when you next start Sametime Connect. You are informed of the availability of the new plug-in.

1. When asked for confirmation, choose to **install the plugin-in**. If you also select to **add the signer to your list of trusted signers**, you will not have to choose again during future updates.

2. Click **OK** to complete the installation.

3. You are informed that you need to restart your Sametime Connect client. Click **Restart Now**.

When you next start Sametime Connect, the ShoreTel Communicator for Sametime plug-in appears as part of the Sametime application.

Verifying Installation

A red **X** over the phone icon in the Sametime Connect toolbar indicates that ShoreTel Communicator for Sametime is unable to send or receive calls.

If your client is displaying a red **X** over the phone icon, contact your system administrator. You may be asked to click on the phone icon and describe the error message that is displayed.

Feature Overview

The ShoreTel Communicator for Sametime plug-in features are:

■ Specify a call handling mode.

■ Set a default telephony device.

■ Make, answer, and manage voice calls.

■ View a list of your active voice calls.

■ View a history of previous voice calls.

■ Create, reply to, and manage voice mail.

■ Control the audio playback of voice messages.

■ Choose specific features that you want through Preferences.

Specifying Call Handling Mode

A call handling mode determines the manner that your inbound calls are handled in a variety of situations. ShoreTel provides five call handling modes: Standard, In a Meeting, Out of Office, Extended Absence, and Custom.

You can manually set the active call handling mode from Sametime Connect or through your ShoreTel IP telephone. If you are using Lotus Notes with embedded Sametime Connect, you can automatically set the call handling mode using your Lotus Notes calendar.

See Chapter 2 for details.

Setting a Default Telephony Device

You can set a default telephony device to receive and make calls. This can be your primary phone (usually your office telephone), your SoftPhone, or any other device set up through Extension Assignment.

Information on setting a default telephony device is in Chapter 2.

Managing Voice Calls

ShoreTel Communicator for Sametime provides telephone-to-telephone call capabilities integrated into Sametime Connect. This means that you can use either your computer (with additional equipment) or your telephone to initiate, answer, and manage telephone calls.

Refer to Chapter 2 for information on managing calls.

List of Active Voice Calls

A list of your active calls, in the order they are made and received, is shown in the Active Call area of the ShoreTel Communicator for Sametime plug-in. If you have more than one active call, new calls are added to the bottom of the list. Depending on how ShoreTel Communicator for Sametime is configured by your system administrator, the Active Call area can list up to 16 calls. Calls that you receive while the Active Call area is full are handled as busy.

Details on a call include the caller's name and phone number, and the current state of the call. Icons provide a visual indication of the call status. The call status icons are:

- - Incoming Call

- - Connected

- - Hold

History of Previous Voice Calls

The History tab displays all previous incoming and outgoing calls; missed calls are displayed in red.

Information on a call indicates whether the call was incoming or outgoing (From/To), the name of the person who made or received the call, the originating phone number, and the date and time of the call. Calls are listed in the order received, you can change the sort order by clicking on the Start Time column header.

Icons provide a visual indication of the call's history. The call history icons are:

- - Missed

- - From

- - To

Managing Voice Mail

ShoreTel Communicator for Sametime provides the ability to create new voice mail, reply to voice mail, and also delete and save existing voice mail. A list of your voice mails, in the order they are received, is shown on the Voicemail tab. Details on a voice mail include the sender's name and phone number, when the message was received, and the subject of the message. Unheard messages are displayed in bold, and messages marked urgent are displayed in red.

The Voicemail tab displays all the voice mails you have received organized into three folders:

- Inbox

- Saved

- Deleted

The number associated with each folder indicates the number of unheard messages in that folder.

The Inbox folder lists all the voice messages in your voice mailbox. Messages remain in this folder until moved to the Saved or Deleted folder.

The Saved folder is a repository for messages that were previously received but are not yet ready for deletion. Messages remain in the Saved folder until you delete them or the maximum time limit set by your system administrator is reached.

Messages moved to the Deleted folder remain there until 2:00 am (server) time, when ShoreTel removes messages that are at least 6 hours old. Voice mail messages less than six hours old remain in the Deleted folder until 2:00 a.m. the next day. Messages moved to the Deleted Folder and then subsequently deleted are removed from the system and cannot be recovered. You can restore messages in the Deleted Folder by moving them to the Inbox or Saved folders, after which they are safe from daily maintenance deletion.

Chapter 3 provides information on managing your voice mail.

Controlling the Playback of Voice Messages

The Playback bar, located on the Voicemail tab, controls the audio playback of voice messages. From the Playback bar you can:

- Select the message playback device (either your PC speaker or telephone)

- Play, pause, and stop a message

- Use the cursor to jump to different points in the message

- Identify the duration of the message.

See Chapter 3 for information on using the Playback bar.

Choosing Features Through Preferences

ShoreTel Communicator for Sametime includes features that you can set through preferences. Preferences allow you to:

- Enable alerts for incoming call.

- Use the Lotus Notes calendar to schedule call handling.

- Enable the assignment of extensions.

- Determine how a call is answered.

See Chapter 4 for information on setting preferences.

Updating ShoreTel Communicator for Sametime

The updating process begins whenever there is a new version of the ShoreTel Communicator for Sametime plug-in. You can choose to manually update the plug-in, or for standalone Sametime Connect, choose to accept an automatic update, or be required to automatically update.

Manual update

1. From standalone Sametime Connect, choose **Tools** > **Plug-ins** > **Install Plug-ins**. If you are using Sametime Connect embedded in Lotus Notes, choose **File** > **Application** > **Install.**

2. In the Install/Update dialog box, select the **Search for updates of the currently installed features** option and then click **Finish**.

3. In the Search Results dialog box, expand the result to display the updated feature (either or both the **ShoreTel Call Control Live Text Feature** and the **ShoreTel Call Control Feature**). Then click **Next**.

4. Accept the terms of the license agreement and click **Next**.

5. In the resulting dialog box, click **Finish** to complete the update.

6. You are informed that you need to restart your Sametime Connect Client. Click **Restart Now**.

When you next start Sametime Connect, the updated ShoreTel Communicator for Sametime plug-in appears as part of the Sametime application.

Installing via Optional Plug-ins on a Standalone Sametime Connect Client

If your system administrator has set up the plug-in to be automatically provided as an optional plug-in, you do not have to search for the feature in order to install any updates. Instead, proceed as follows:

1. From Sametime Connect, choose **Tools** > **Plug-ins** > **Check for optional Plug-ins…**.

2.   Follow steps 3 - 6 from the section Manual update.

When you next start Sametime Connect, the ShoreTel Communicator for Sametime plug-in appears as part of the Sametime application.

Automatic update on a Standalone Sametime Connect Client

If your system administrator has set up the plug-in to be automatically installed, Sametime Connect will automatically recognize updates to plugins within half an hour of them being installed on the server. The automatic update process will then begin when you next start Sametime Connect. You are informed of the availability of the updated plug-in.

1.   If you have not yet selected to add the signer to your list of trusted signers, you will be asked for confirmation. Choose to **install the plugin-in**. If you also select to **add the signer to your list of trusted signers**, you will not have to choose again during future updates.

2.   Click OK.

3.   You are informed that you need to restart your Sametime Connect client. Click **Restart Now**.

Uninstalling

The process for uninstalling ShoreTel Communicator for Sametime differs for the Sametime Connect standalone client and Sametime Connect embedded in Lotus Notes.

Uninstalling for Standalone Sametime Connect

1.   From Sametime Connect, choose **Tools** > **Plug-ins** > **Manage Plug-ins**.

2.   In the Application Management window, select **ShoreTel Call Control Feature** and **ShoreTel Call Control Live Text Feature**, and click **Uninstall**.

3.   Restart your Sametime Connect client.

When you next start Sametime Connect, the ShoreTel Communicator for Sametime plug-in will no longer be part of the Sametime application.

Uninstalling for Sametime Connect Embedded in Lotus Notes

1.   From Lotus Notes, choose File > Application > Application Management.

2.   Follow steps 2 - 3 from the section Uninstalling for Standalone Sametime Connect.

When you next start Lotus Notes, the ShoreTel Communicator for Sametime plug-in will no longer be part of the Sametime application.

CHAPTER
2

Making and Managing Voice Calls

Overview

With ShoreTel Communicator for Sametime you have telephone-to-telephone call capabilities integrated into Lotus Sametime Connect. This means that you can use either your computer (with additional equipment) or your telephone to initiate and manage telephone calls.

Managing Voice Calls

Setting a Call Handling Mode

A call handling mode determines the manner that your inbound calls are handled in a variety of situations. ShoreTel provides five call handling modes: Standard, In a Meeting, Out of Office, Extended Absence, and Custom.

The definition of each call handling mode is determined by your system administrator. This definition can include a recorded greeting and how to handle call forwarding in various situations.

You can manually set the active call handling mode from Sametime Connect or through your ShoreTel IP telephone (for details, refer to the documentation for your specific telephone). If you are using Lotus Notes with embedded Sametime Connect, you can automatically set the call handling mode using your Lotus Notes calendar.

Manually setting call handling modes

1. Click the Call Handling Mode icon on the tool bar at the top of your contacts list.

2. From the drop-down menu, select the call handling mode you want for your incoming calls.

    The icon changes to indicate the active call handling mode. ShoreTel uses this mode to handle all incoming calls until you either manually select a different mode, or an automatic mode transition is performed by a Lotus Notes appointment.

Automatically setting call handling modes using Lotus Notes calendar

1. Make sure you have specified the Use Lotus Notes calendar to schedule Call Handling preference.

    Refer to Chapter 4 for details.

2. Use your Lotus Notes calendar to indicate available (free time) and busy hours (busy time).

    The Call Handling Mode icon, on the tool bar at the top of your Sametime contacts list, automatically changes to indicate the call handling mode indicated by your calendar. ShoreTel uses this mode to handle all incoming calls until you either manually select a different mode, or another automatic mode transition is performed by the calendar.

Selecting the Default Telephony Device

To receive and make calls from the telephony device you want to use, you must select your default device. This can be your primary phone, your SoftPhone, or any other device set up through Extension Assignment.

■ Your primary phone is the phone configured by the system administrator as your office extension.

■ SoftPhone is a ShoreTel Communicator component that allows you to make calls and use voice mail directly through your computer's audio features.

■ Extension Assignment forwards calls to a designated system device or a remote telephone.

Both SoftPhone and Extension Assignment require system administrator authorization. Once you have authorization, you need to enable Extension Assignment as explained on page 29.

1. Click on the telephony device icon at the top of your contacts list.

2. From the menu, choose the device you want to use to make and receive calls.

   The icon changes to indicate the default device. ShoreTel routes all your calls to this device.

   Note

   When you elect to use Softphone from your Extension Assignment menu, ShoreTel Communicator launches automatically.

3. If you want to use an Extension Assignment device that is not listed on the menu, choose **Configure Extension Assignment**.

   The ShoreTel Communicator for Sametime panel of the Preferences window opens for you to enable an Extension Assignment device. For more information on enabling Extension Assignment, refer to page 29.

Making a Call

The simplest way to make a call is to select a recipient and click the Call icon.

The recipient's current geographic location telephone number is automatically dialed. If the recipient hasn't specified their current geographic location telephone number, the telephone number from their Sametime business card is called. If that number also has not been specified, clicking the Call icon has no effect.

You can also make a call by right-clicking on a recipient from a Contacts list and then choosing Call from the resulting menu. Doing so may result in multiple numbers from which to choose. These numbers can be the recipient's telephone extension, their current geographic location telephone number, and the telephone number(s) from their Sametime business card.

Calls can also be made from:

■ The History tab

■ The search bar

■ A chat window

- A business card
- A Lotus Notes email

Regardless of where you start the call from, details of the connected call are displayed in the Active

Call area of the ShoreTel Communicator for Sametime plug-in.

To end a connected call, click **Hang Up** from the toolbar of the ShoreTel Communicator for Sametime plug-in.

Making a Call from the History Tab

The ShoreTel Communicator for Sametime History tab provides a list of calls you answered, made, and missed.

1. Right-click or double click the name of the person or number you want to call.

2. Select **Call** from the menu to call the person's primary phone. You also have the option to select **Call Primary Phone** to call their primary phone number, or **Call Cell Phone** to call their cellular phone number, if this information is configured in the system.

Using Search to Make a Call

You can easily call someone not on a contacts or History list by using search.

The search feature locates the names and phone numbers of people in your server community. A server community is a group of people belonging to the same directory or user registry, such as your corporate directory, or external server communities outside of your organization. Your administrator determines which server communities you can access.

You can use the search feature to make a call by searching for a name or searching for a number.

Searching for a name

1. In the Search field, begin typing the name of the person you want to call.

   As you type, the search results are shown with a list of names that match your entry. If the name is not found, the **Search directory for** option is displayed.

2. If the search results include the person you want to call, right-click on the person's name, and then select **Call** and a phone number from the menu.

3. If the name is not found, choose **Search Directory for**. In the directory, right-click on the person's name, and choose **Call** and a phone number from the menu.

Searching for a number

1. In the Search field, type an extension or the entire telephone number you want to call.

2. Press **Enter**, or choose **Call Phone Number** from the search results.

Making a Call from a Chat Window

If you have an open chat window and decide to speak directly to an individual rather than using the instant message option, you can easily make a call to that person from the chat window.

1. Right-click on the person's name in the header of the chat window.

2. Choose **Call** from the menu, and then a phone number.

Making a Call from a Business Card

A business card displays user and business information about a contact. Business cards can be viewed from the Contact list and the chat window.

1. Right-click on the name of the person or group you want to call.

2. Choose **Business Card** from the menu

3. In the business card, right click on the linked phone number you want to call.

Making a Call from a Lotus Notes Email

There are two ways you can make a call using email:

■ Using the Lotus Notes email list

■ Using an email

You must have enabled the click to call feature in Lotus Notes to make a call from within a Lotus Notes email. Phone numbers in Lotus Notes emails then become "hot," allowing you to click on the phone number to make a call.

Using Lotus Notes email list

1. In an email folder, right-click on the email from the person you want to call.

2. From the menu, choose the person's name and then **Call**.

Using an email

1. In the body of an email, click on the linked phone number you want to call.

Handling Incoming Calls

You are notified of an incoming call in three ways:

■ You hear an audible tone from your default device.

■ Call information is shown in the Active Call area of the ShoreTel Communicator for Sametime plug-in.

- A call alert is displayed. This notification method is only available if enabled in the ShoreTel Communicator for Sametime Preferences. For more information on setting preferences, see Chapter 4.

You can either answer an incoming call, or route an incoming call to voice mail.

Answering a Call

Answering a call is easy with ShoreTel Communicator for Sametime. Once answered, the details associated with the call in the Active Call area changes to indicate the connected status of the call.

To answer a call, you can:

- Click **Answer** from the toolbar of ShoreTel Communicator for Sametime.

- Click **Answer** from an Incoming Call alert. The alert, which appears in the bottom right corner of your monitor screen, indicates the caller's name and number.

To end the connected call, click **Hang Up** from the toolbar of the ShoreTel Communicator for Sametime plug-in.

Routing a Call to Voice Mail

Instead of answering a call, you can route it to your voice mail.

1. Click **Send to VM** from an Incoming Call alert. The alert, which appears in the bottom right corner of your monitor screen, indicates the caller's name and number.

The call is removed from the Active Call area of the ShoreTel Communicator for Sametime plug-in. If the person leaves you a voice mail, an entry is shown on the Voicemail tab.

Activating Camp-On

Camp-On alerts you when a person engaged in a call has ended the call and becomes available to take your call.

You can activate camp-on from either a Sametime Connect contacts list or from a Lotus Notes email.

1. Right-click on the name of the person you want to call in the contacts list, or the e-mail header.

2. Select **Activate Camp-On** from the menu.

3. If you change your mind before the other person is available, right-click on the name of the person in the contacts list or the e-mail header and select **Deactivate Camp-On** from the menu.

4. When the other party becomes available, an alert is displayed. From the alert, click **Call** to place the call; click **Close** if you decide not to make the call.

Managing Calls

Once you are on a call you can:

- Place the call on hold

- Move between calls

- Transfer the call

- Create a conference call

Placing a Call on Hold

Placing a call on hold maintains the active status of a call while suspending the conversation. This allows you to place another call or perform other activities without losing the call.

You can move between multiple call on hold, as explained below.

Call details are displayed in the Active Call area of the ShoreTel Communicator for Sametime plug-in.

Placing a call on hold

- Click **Hold** from the toolbar of the ShoreTel Communicator for Sametime plug-in.

Retrieving a call on hold

1. Click **Unhold** from the toolbar of the ShoreTel Communicator for Sametime plug-in.

Moving Between Calls

You can move between multiple calls (i.e. one connected call and one or more calls on hold).

- Click **Next** from the toolbar of the ShoreTel Communicator for Sametime plug-in.

  When you click **Next**, the connected call is put on hold, and you are connected to the next call in the list. If you want to be connected to a call further down in the list, continue to click **Next** until you reach the call to which you want to connect.

Transferring Calls

You can transfer a call to another person or number. Once transferred, the call is removed from the Active Call area of the ShoreTel Communicator for Sametime plug-in.

1. Call the person or number to which you want to transfer the call on hold.

2. Wait for the call to connect and announce the transfer.

3. Click **Transfer** from the toolbar of the ShoreTel Communicator for Sametime plug-in.

  Once the transfer is made, both parties are removed from the Active Call area of the ShoreTel Communicator for Sametime plug-in.

Creating a Conference Call

Conference calls are voice calls that involve more than two parties. ShoreTel supports conference calls with a maximum of six participants.

1. Make a call to a participant.

2. Make a call to the other participant.

3. Wait for the call to connect, and then if desired, announce the conference call.

4. Click **Conference** from the toolbar of the ShoreTel Communicator for Sametime plug-in.

   Once the calls are combined, the Active Call area displays the participants.

To terminate a conference call (all parties)

■ Click **Hang Up** from the toolbar of the ShoreTel Communicator for Sametime plug-in.

Note

If you want to hang up on only specific participants, use your ShoreTel IP telephone (For details, refer to your telephone's documentation).

CHAPTER

3

Working with Voice Mail

Overview

ShoreTel Communicator for Sametime provides options to work with voice mail from within Sametime Connect. This includes the ability to listen and reply to, create, and handle voice mails.

Selecting Your Playback and Recording Device

You can listen to and record your voice mails using either your computer microphone and speakers, or your telephone.

1. Click on the playback device icon on the Playback bar.

2. From the drop-down menu, select either **Via PC Speakers** or **Via Phone Instrument**. The icon changes to indicate the selected audio device.

Voice Mail

A list of your voice mails, in the order they are received, is shown on the Voicemail tab. Messages that have not yet been heard are displayed in bold.

Listening to voice mail

- Double-click on the voice mail you want to listen to.

    When listening to messages through your computer or telephone speakers, playback begins immediately. If your default playback device is a telephone without speakers, your phone rings and the message playback begins after you lift the receiver.

Controlling audio playback of a voice mail

- Use the Play/Pause and Stop buttons, and the cursor, on the Playback bar.

Replying to Voice Mail

You can reply to a voice mail by making a call, sending a voice mail, or using IM.

1. Select the voice mail you want to respond to from the list.

2. To reply by voice and call the person's default telephone number, click **Reply**.

    Details on the call are displayed in the Active Call area of the ShoreTel Communicator for Sametime plug-in.

3. To reply by dialing another number or using a different communication method, click on the **Reply** drop-down menu and select the appropriate option. Options can include calling another number, replying by voice mail, or using IM.

If you choose to respond using voice mail or IM, the appropriate window opens for you to compose the response.

Creating New Voice Mail

There are four ways you can create a new voice mail. You can create a voice mail from:

■ A contacts list

■ The Voicemail tab

■ A chat window

■ The Lotus Notes email list

Regardless of which method you use, the New Voice Message window appears. This window is used to record and to send the message.

Creating a Voice Mail from a Contacts List

Your contacts list reflect the people, or groups, you call most frequently.

1. Right-click on the name of the person or group to which you want to send a voice mail.

2. Select **New Voice Message** from the menu. The New Voice Message window opens.

3. Use the New Voice Message window to record and to send the message, as explained on page 24.

Creating a Voice Mail from the Voicemail Tab

Voice mails can be initiated from the ShoreTel Communicator for Sametime Voicemail tab.

1. Click **New**. The New Voice Message window opens.

2. Use the New Voice Message window to record and to send the message, as explained on page 24.

Creating a Voice Mail from a Chat Window

You can create a voice mail from a chat window.

1. Right-click in the header of the chat window.

2. Choose **New Voice Message** from the menu.

3. Use the New Voice Message window to record and to send the message, as explained on page 24.

Creating a Voice Mail from the Lotus Notes Email List

If you are using Lotus Notes, you can create a voice mail from a Lotus Notes email list.

1. In an email folder, right-click on the email to which you want to send a voice message response.

2. Choose the person's name and then choose **New Voice Message** from the menu. The New Voice Message window opens.

3. Use the New Voice Message window to record and to send the message, as explained below.

Using the New Voice Message Window

The New Voice Message window is used to record and to send the voice messages.

1. Use the **Dest.** and **Delete** buttons to create and edit the list of recipients.

   ■ Clicking the **Dest.** button opens the Find Destination window, which is used to search for, and select, the appropriate recipients.

   ■ Clicking **Delete** removes the selected recipient in the list.

2. In the **Subject** field, type the subject of the message.

3. If the message requires immediate attention, select the checkbox for **Urgent**.

4. Click the **Record** button and speak into your microphone or telephone to record your message.

   The device you use to record a voice mail is determined by your playback device (see page 22 for details).

5. Click the **Stop** button when you have finished recording.

6. Use the **Play/Pause** button and the **cursor** to review the message.

7. When you are ready to send your recorded message, click **Send**.

Managing Voice Mail

You can manage and organize your voice mail displayed in the Voicemail tab by:

■ Saving messages

■ Deleting messages

■ Editing the subject heading

■ Changing the status of a message

Saving Voice Mail

Saving a voice mail moves the message from the Inbox or Deleted folder to the Saved folder.

1. On the Voicemail tab, select the voice mail you want to save from the appropriate folder.

2. Click **Save**.

The message is moved to the Saved folder. Messages remain in the Saved folder until you delete them or the maximum time limit set by your system administrator is reached.

Deleting Voice Mail

Voice mail moved to the Deleted folder remains there until 2:00 a.m (server) time, at which point ShoreTel removes all messages that are at least 6 hours old. Voice mail less than six hours old remains in the Deleted folder until 2:00 a.m. the next day.

You can recover messages displayed in the Deleted folder by selecting the message and clicking Save. The message is moved into the Saved folder. Once the message is deleted by the system, it cannot be retrieved.

1. On the Voicemail tab, select the voice mail you want to delete from the Inbox or Saved folder on the Voicemail tab.

2. Click **Delete**.

The message is moved to the Deleted folder.

Editing the Subject Heading

By default, all voice mails on the Voicemail tab have the subject heading "Voice Message." You can create a more descriptive heading to help you easily identify the subject of the message.

1. On the Voicemail tab, right-click the voice mail whose subject heading you want to change.

2. Select **Edit Subject** from the menu.

The Subject field of the message becomes active.

3. In the **Subject** field of the message, type the new heading.

4. Press **Enter**.

Changing the Message Status

You can manually change a message status to visually indicate that a message is heard or unheard. Unheard messages are listed in bold in on the Voicemail tab.

Moving an unheard voice mail from the Inbox to either the Saved or Deleted folders will mark the message as heard.

1. On the Voicemail tab, right-click the voice mail whose status you want to change.

2. Select **Mark as Heard** or **Mark as Unheard**, as appropriate, from the menu.

Unified Messaging Limitations

■ Voice mail cannot be forwarded via the Sametime client, but can be forwarded via the ShoreTel Telephone.

■ The originating voice mail cannot be attached when replying to a message.

■ Voice mail cannot be sent to, or answered, from a group or distribution list.

■ Forwarded voice mail cannot be played via the Sametime client, however it can be played via the ShoreTel Telephone.

CHAPTER

4

Setting Preferences

Overview

The ShoreTel Communicator for Sametime plug-in provides features that you can set through preferences. ShoreTel Communicator for Sametime preferences allow you to enable:

■ Incoming call alerts.

■ Call handling from the Lotus Notes calendar.

■ Extension assignment.

These preferences are set using the Sametime Communicator for Sametime Preferences panel.

Displaying the Preferences Panel

The ShoreTel Communicator for Sametime preferences panel is used to set preferences specific to the plug-in.

1. Choose File > Preferences.

The Preferences window is displayed.

2. Select ShoreTel Communicator for Sametime from the navigation menu.

Enabling Incoming Call Alerts

You can choose to receive an alert on incoming calls. In addition to providing the caller's name and number, the alert allows you to easily answer the call or send the call to voice mail.

■ From the ShoreTel Communicator for Sametime panel of the Preferences window, select the **Show incoming call alert** and then click **OK**.

Configuring Call Handling from the Lotus Notes Calendar

A call handling mode determines the manner that your inbound calls are handled in a variety of situations. ShoreTel provides five call handling modes: Standard, In a Meeting, Out of Office, Extended Absence, and Custom. The definition of each call handling mode is determined by your system

administrator. This definition can include a recorded greeting and how to handle call forwarding in various situations.

If you are using Lotus Notes with embedded Sametime Connect, you can automatically set the call handling mode from the calendar, as explained in Chapter 2. Before doing so, you must set the appropriate preferences.

1.   From the navigation menu of the Preferences window, select **Sametime** > **Auto-Status Changes**.

2.   On the Auto-Status Changes panel, select **Meetings scheduled in my calendar** and the appropriate options for your meetings, and then click **Apply**.

3.   From the navigation menu of the Preferences window, select **Sametime** > **Auto-Status Changes** > **Calendar Service**.

4.   On the Calendar Service panel, select **Check Lotus Notes calendar for meetings to allow auto-changes** and then click **Apply**.

5.   From the navigation menu of the Preferences window, select **ShoreTel Communicator for Sametime**.

6.   On the ShoreTel Communicator for Sametime panel, select the **Use Lotus Notes calendar to scheduled Call Handling**.

7.   From the menu associated with the **Call Handling Mode for Available Hours** option, choose the mode that you want to be used during free time on your calendar.

8.   From the menu associated with the **Call Handling Mode for Busy Hours** option, choose the mode that you want to be used during busy time on your calendar.

9.   Click **OK**.

Enabling Extension Assignment

Extension Assignment is a ShoreTel feature that allows you to reassign your extension to any phone connected to the ShoreTel system or remote devices with access to the network, including home phones and mobile devices. Access to Extension Assignment requires system administrator authorization.

Once you have authorization, you need to enable Extension Assignment. You can then choose an Extension Assignment number to receive and make all your calls, as explained in the section Selecting the Default Telephony Device on page 15.

The Active area of the ShoreTel Communicator for Sametime plug-in displays calls received through Extension Assignment.

1.   On the ShoreTel Communicator for Sametime panel or the Preferences window, select **Enable Extension Assignment**.

2.   In the External Number field, type the number of the phone where you want to receive calls that are forwarded from your extension.

Clicking the arrow on the right side of the field displays a drop-down menu with phone numbers that you previously specified as your external number. This menu can be cleared by clicking **Clear previous Numbers**.

3. Select your preferred activation method. The activation method specifies how the Extension Assignment call is connected to your external device. The activation options are:

   ■ **Accept Call by pressing "1"**. The Extension Assignment call is sent to your external device, and you are prompted to press numeric key 1 if you wish to accept the call.

   ■ **Accept Call by answering**. The Extension Assignment call is sent to your external device and you are connected directly to the call once you pick up the device.

4. If you want to configure additional Extension Assignment numbers, click **Apply** and then repeat steps 2 and 3.

Note

You can only have one Extension Assignment number enabled at a time. However, you can configure multiple numbers as options to choose from.

5. Click **OK**.