



Powering connections

Connect Client User Guide

November 15, 2017

Trademarks

© Copyright 2017, Mitel Networks Corporation. All Rights Reserved. The Mitel word and logo are trademarks of Mitel Networks Corporation. Any reference to third-party trademarks is for reference only and Mitel makes no representation of ownership of these marks.

Patents

Mitel products are covered by patents as listed at <http://www.shoretel.com/about/patents.html>.

Version Information

User Guide

Version: UG_1_11/15/17

Date: November 15, 2017

Company Information

Mitel Networks Corporation

350 Legget Dr.

Kanata, Ontario K2K 2W7

Canada

+1.844.937.6483

Table of Contents

Preface	5
Objectives of this Book	5
Organization	5
Conventions	6
 Chapter 1	 9
Installing the Connect Client	9
Overview	10
Anti-Virus Folders Exclusions	11
Installing the Connect Client on Windows OS	12
Installing the Connect Client on OS X	12
 Chapter 2	 13
Using the Connect Client	13
Signing in to the Connect Client	14
Opening Connect Client Automatically	15
Changing the Connect Client Password	15
Navigating through the Connect Client Interface	16
Pinning Tabs for Quick Access	18
Docking the Connect Client	19
Adding Shortcuts to the Client Toolbar	19
Selecting Preferred Language	20
Setting a Sound Notification	20
Connect Client Logs	21
Sharing Data with Mitel	22
 Chapter 3	 23
Managing Contacts	23
Managing Contacts	24
Adding a Contact on Mac OS	25
Adding a Contact on Windows	25
Viewing Information of a Contact	26
Importing the Contact Folders	27
Deleting a Contact	28
Adding a Contact to your Favorites List	28
Viewing Favorites	29
Searching Contacts	29
Sorting Contacts	29

	Viewing Call Stack Information of a Contact	29
	Managing Contact Groups	30
	Creating a Contact Group	30
	Reordering the List of Contact Groups	30
	Editing or Deleting a Contact Group	30
Chapter 4	Managing Availability States	33
	Understanding Availability States	34
	Setting Alert for Contact's Availability State	35
	Changing Availability State	36
	Selecting a Predefined Availability State	36
	Configuring a Custom Availability State	36
	Allowing a Contact to Manage your Availability State	37
Chapter 5	Managing Phones	39
	Managing your Desk Phone	40
	Assigning your Desk Phone	40
	Customizing your Desk Phone	40
	Removing the Desk Phone Assignment	40
	Using the Softphone	41
	Assigning Softphone	41
	Customizing the Softphone	42
	Assigning External Phones	42
Chapter 6	Managing Calls	45
	Making a Voice Call	47
	Answering a Voice Call	48
	Managing Incoming Call Notifications	49
	Answering Call from Call Stack of a Contact	49
	Viewing Call Interaction History with a Contact	50
	Transferring a Call	50
	Transferring a Call Using the Transfer Option	51
	Transferring a Call Using the Consult Option	52
	Parking a Call	53
	Transferring a Call Using the Intercom Option	54
	Transferring a Call Using the Whisper Option	54
	Transferring a Call to Voicemail	55
	Making a Conference Call	55
	Creating a Blind Conference Call	56
	Creating a Consultative Conference Call	56
	Creating an Intercom Conference Call	56
	Managing Call Notes and Viewing Routing Slips	57
	Making a Video Call	59
	Setting Up Video Camera Preferences	59
	Managing Voicemail	60
	Forwarding Calls to your Voicemail Inbox	60
	Leaving a Voicemail Message	61
	Accessing Voicemail Messages	61

Viewing Voicemails from a Contact	61
Listening to a New Voicemail Message	62
Saving a Voicemail Message	62
Replying to a Voicemail Message	62
Forwarding a Voicemail Message	63
Deleting a Voicemail Message	63
Restoring a Deleted Voicemail Message	63
Configuring Email Notifications for Voicemail Messages	64
Managing System Notifications for Voicemail Messages	64
Changing your Voicemail Password	65
Recording Voicemail Greeting Name	65
Playing Envelope Information for Voicemail	65
Routing Calls	66
Availability Routing	66
Using Power Routing	70
Routing Calls to Mobile	73
Customizing your Call Option Settings	73
 Chapter 7	
Managing Instant Messaging	75
Sending an Instant Message	76
Viewing IM Conversation History with a Contact	77
Scheduling a Meeting with a Contact Group	77
Sending a Group Voicemail	78
Managing Instant Messaging Notifications	78
Adding Canned IM Responses	79
 Chapter 8	
Integrating with Microsoft Exchange	81
Integrating the Connect Client with Microsoft Exchange	82
Synchronizing the Events and the Availability Status with Microsoft Outlook or Office 365 Calendar	83
Synchronizing the Connect Client with Microsoft Outlook or Office 365 Contact Folders	84
Synchronizing the Connect Client Voicemails with Microsoft Outlook or Office 365	85
 Chapter 9	
Managing Conferences	87
Creating a Conference	88
Creating a Conference from Microsoft Outlook	90
Creating a Reservation-less Conference from My Conference Bridge	91
Migrating Reservation-less Conferences from ST Communicator	92
Viewing Conferences	92
Downloading the iCalendar Data (ICS) File for a Conference	93
Joining a Conference	93
Joining a Conference from the Notification Area	94
Joining a Conference from the Events Tab	95
Joining a Conference from Your Calendar	96
Placing a Participant on Mute	97
Dropping a Participant from Conference	97
Recording a Conference	98
Canceling a Conference	99

	Canceling a Conference from the Connect Client	99
	Canceling a Conference from Microsoft Outlook	99
	Conferencing using Connect Client for Web	100
	Using the Connect Client for Web	100
	Using Group Chat	101
	Using Screen Sharing	101
	Managing System Notification for Screen Sharing Request	103
Chapter 10	Sharing on the Connect Client	105
	Sharing Screens with a Contact	106
Chapter 11	Managing Workgroups	107
	Workgroups Overview	108
	Workgroups Access Types	108
	Identify Call by Workgroup Name	108
	Managing Workgroups	109
	Viewing Workgroups Information	109
	Assigning Call Handling Mode Status	109
	Filtering Queued Calls	109
	Managing Agents	110
	Accessing Workgroups Voicemails	111
	Configuring Workgroup Notifications	112
	Setting Queue Monitor Alert Threshold	113
Appendix A	Operator Features	115
	Operator Features	116

Preface

This preface provides information about the objectives, organization, and conventions used in the *User Guide*.

Objectives of this Book

ShoreTel is now part of Mitel. Together, we look forward to helping you power connections that are brilliantly simple.

This guide explains how to install, configure, administer, and maintain the Connect client.

Organization

This guide includes the following sections:

Table 1: User Guide Contents

Chapter	Description
Chapter 1, Installing the Connect Client	Describes the requirements and procedures to install and launch the Connect client on Windows and Macintosh.
Chapter 2, Using the Connect Client	Describes the procedure to sign in and navigate through Connect client.
Chapter 3, Managing Contacts	Describes the procedures to: <ul style="list-style-type: none">■ Add and delete a contact■ Create, edit, and delete a contact group
Chapter 4, Managing Availability States	Describes the availability icons and the process to change the availability status.
Chapter 5, Managing Phones	Describes the procedures to assign a desk phone, softphone, and external number to Connect client.

Table 1: User Guide Contents

Chapter	Description
Chapter 6, Managing Calls	Describes the procedures to manage and route calls and voicemails.
Chapter 7, Managing Instant Messaging	Describes the procedures to: <ul style="list-style-type: none"> ■ Send an Instant Message (IM) and group voicemail ■ Manage IM notifications
Chapter 8, Integrating with Microsoft Exchange	Describes the procedure to: <ul style="list-style-type: none"> ■ Integrate Connect client and voicemail with Microsoft Exchange ■ Integrate Outlook contacts and calendar with Connect client
Chapter 9, Managing Conferences	Describes the procedures to: <ul style="list-style-type: none"> ■ Create, view, record, and cancel conferences. ■ Join a Connect conference from any non-Mitel network without entering any authentication details.
Chapter 10, Sharing on the Connect Client	Describes the procedure to share screens and files on Connect Client.
Chapter 11, Managing Workgroups	Describes the procedure to view workgroup information, filter queued calls, manage agents, and share voicemail.
Appendix A, Operator Features	Describes the features available only for Operators.

Conventions

This guide uses the following advisory notices:



Note

This information is extra, or supplementary.

The following typographical marking conventions are used in this document.

Marking	Meaning
Bold	Names of interface objects, such as buttons and menus.
Blue	Cross references with hyper-links. Click the blue text to go to the indicated section. Note: Table of Contents entries are also links, but they are not shown in blue.

CHAPTER

1

Installing the Connect Client

This chapter provides information about how to install the Connect client.

Overview	10
Anti-Virus Folders Exclusions	11
Installing the Connect Client on Windows OS.....	12
Installing the Connect Client on OS X.....	12

Overview

The Connect presents a single interface to manage business communications using a ST desk phone, computer, or mobile phone. With support for Microsoft Windows, Macintosh (OS X), and Collaboration for Web, the Connect client simplifies your day-to-day communications and streamlines your work.

Operating System

For Microsoft Windows:

- Microsoft Windows 7 SP1
- Microsoft Windows 8
- Microsoft Windows 8.1
- Microsoft Windows 10

For Macintosh OS X:

- Apple OS X 10.11
- Apple OS X 10.12

For Windows Server:

- Windows Server 2012, 64-bit (Standard)
- Windows Server 2008 SP2 (Standard)

Minimum Hardware Configuration

For Windows:

- Processor (For Windows 7 and Windows 8)
 - Connect client without Media (only telephony interaction, and call control): Dual Core 1.6 GHz
 - Connect client with Media (includes Softphone and Video): Dual Core 2.4 GHz
- Hard Disk Space: 2GB
- RAM Total: 4GB
- RAM Available: 500 MB

For Mac OS:

- Processor
 - Connect client without Media (only telephony interaction, and call control): Core 2 Duo 1.83 GHz
 - Connect client with Media (includes Softphone and Video): Core 2 Duo 2.4 GHz
- Hard Disk Space: 2GB
- RAM Total: 8GB
- RAM Available: 500 MB

Supported Servers

- Microsoft Exchange 2010
- Microsoft Exchange 2013
- Microsoft Exchange 2016
- Microsoft Office 365

Supported Browsers

For Microsoft Windows:

- Chrome 55.0 and above
- Internet Explorer 11
- Firefox 49.0 and above
- Edge 38

For Macintosh OS X:

- Chrome 55.0 and above
- Firefox 49.0 and above
- Safari 9.0 and above

Supported Environments

- Citrix XenDesktop 7.6 LTSR
- Citrix XenApp 7.6 LTSR

Anti-Virus Folders Exclusions

On your computer, you must exclude the below folders and sub-folders from the Virus Checker software before installing the Connect Client.

```
<Drive>:\Users\%User%\AppData\Local\ShoreTel  
<Drive>:\Program Files (x86)\ShoreTel  
<Drive>:\Program Files (x86)\ShoreTel Presenter
```

Installing the Connect Client on Windows OS



Note

If you have installed the ST Communicator on your computer, the Connect client installer will uninstall the Communicator before installing the Connect client.

1. Do one of the following:
 - Open the e-mail notification from your Connect administrator that describes how to install the Connect client, and click the link to install the client.
 - In a browser, enter `<FQDN>/shorewareResources/ClientInstall`, where *FQDN* is your company's fully qualified domain name, click the Connect client, and click **Next**.
2. On the **License Agreement** page, select **I accept the terms in the license agreement**, and click **Next**.
3. Click **Next** to install the client in the default folder, or click **Change** to change the destination folder and continue.
4. On the **Ready to Install the Program** page, click **Install**.
5. On the **InstallShield Wizard** page, click **Finish**.
6. On the Start menu, click the **Connect** icon to launch the client.

Installing the Connect Client on OS X

1. Do one of the following:
 - Open the e-mail notification from your Connect administrator that describes how to install the Connect client, and click the link to install the client.
 - In a browser, enter `<FQDN>/shorewareResources/ClientInstall`, where *FQDN* is your company's fully qualified domain name, and click the Connect client.

The installation file is downloaded to the default downloads folder on your computer.

2. Double-click the installation file.
3. In the Connect screen, drag the **Connect** icon into the **Applications** folder and double-click the icon to launch the client.

CHAPTER

2

Using the Connect Client

This chapter provides information about how to use the Connect client.

Signing in to the Connect Client.....	14
Opening Connect Client Automatically	15
Changing the Connect Client Password	15
Navigating through the Connect Client Interface	16
Pinning Tabs for Quick Access	18
Docking the Connect Client	19
Adding Shortcuts to the Client Toolbar	19
Selecting Preferred Language	20
Setting a Sound Notification.....	20
Connect Client Logs.....	21
Sharing Data with Mitel	22

Signing in to the Connect Client

You can sign in to the Connect client using your Connect credentials.

1. Double-click the Connect client icon and enter your Connect credentials:

- Email address or username

If your Connect client and Microsoft Exchange email addresses are the same, sign in using your email address to integrate the Connect client with Microsoft Exchange. For more details about integrating the Connect client with Microsoft Exchange, refer to Chapter 8, [Integrating with Microsoft Exchange](#) on page 81.

- Password

2. If desired, select any of the following optional settings:

- If you are signing in using the Windows credentials, select the **Use Windows Credentials** check box to fetch your credentials.



Note

The **Use Windows Credentials** option is applicable only for ONSITE users.

- To save your credentials, select the **Remember this and log me in automatically next time** check box.

3. Click **+Show Advanced...** to see the Domain and Server fields.

4. In the **Server** field, enter the Fully Qualified Domain Name (FQDN).

FQDNs for Connect CLOUD users:

- U.S./Canada: **clientstart.sky.shoretel.com**
- U.K./Europe: **clientstart.sky.shoretel.eu**
- Australia: **clientstart.sky.shoretel.com.au**

5. Click **Log In**.

To sign out from the Connect client, click the **<username>** tab, and click **Log Out**.



Note

Depending on how your system is configured, you might need to enter your credentials manually rather than using the **Use Windows Credentials** check box.

Opening Connect Client Automatically

You can enable Connect client to open automatically when you start the computer.

1. On the dashboard, click the <username> tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Account > Access**.
4. Select the **Automatically launch ShoreTel Connect when starting the computer** check box.

Changing the Connect Client Password



Note

You can change your password from the Connect client only when your Connect client is not integrated with Microsoft Exchange. The password automatically changes as you change the password in Microsoft Exchange.

1. On the dashboard, click the <username> tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Account > Login**.
4. Enter:
 - Current password
 - New password
 - Confirm new password
5. Click **Set New Password**.

Navigating through the Connect Client Interface

The Connect client consists of three panes based on the options you select on the dashboard, as shown in [Figure 1](#).

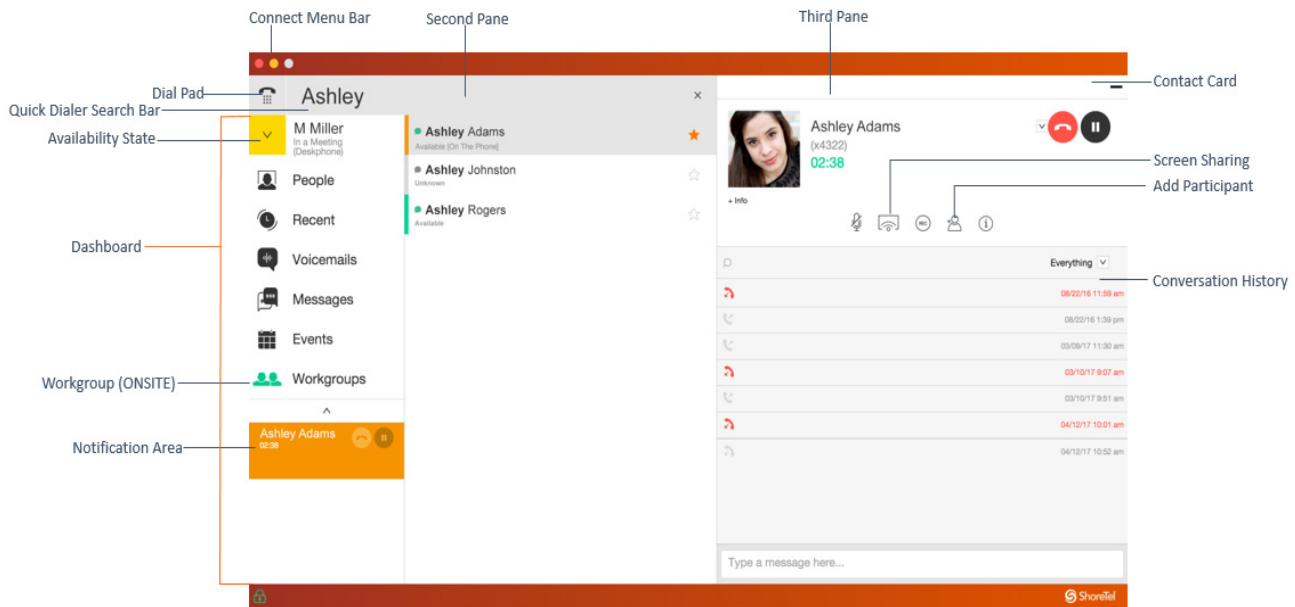


Figure 1: Connect Client

- **Connect menu bar**—Use the **Connect** drop-down on the client menu bar to do the following:
 - View information about the Connect.
 - Check for updates.
 - Open the Settings page (for Windows) or Preferences page (for Mac OS).
 - Show or edit the toolbar.
 - Set the Connect client to be on top while navigating through other applications. For Mac OS, this option is available in the **Window** tab on the Mac menu bar.
 - Navigate to the Mitel support page. For Mac OS, this option is available in the **Help** tab on the Mac menu bar. This is applicable only to the Connect CLOUD users.
 - Access the user guide and training videos. For Mac OS, this option is available in the **Help** tab on the Mac menu bar.
 - Send log files to the Mitel Support. For Mac OS, this option is available in the **Help** tab on the Mac menu bar.
 - Exit the Connect client.
- **Dial Pad**—Use the dial pad to dial a phone number.

- **Quick Dialer Search Bar**—Use the quick dialer search bar to search for a name, number, an email address, or company name.
- **Dashboard**—Dashboard is the default and the main navigation pane:
 - **<username>**—Use the <username> tab to view or edit your profile information. You can add your LinkedIn profile picture as your Connect client profile picture. If the Connect client is integrated with Microsoft Exchange, it imports your Outlook profile picture. For more information about integrating with Microsoft Exchange, refer to Chapter 8, [Integrating with Microsoft Exchange](#) on page 81.
 - **People**—Use the People tab to view your contacts, add a new contact, create groups, and add contacts to Favorites or Groups.
 - **Recent**— Use the Recent tab to view the list of your incoming calls (↙), outgoing calls (↗), and missed calls (↘). It displays the calls in chronological order, with the most recent at the top.

For all incoming and outgoing calls, it displays the date followed by the call duration. For the current day calls, it displays only the call duration. For the previous day calls, it displays “Yesterday” instead of date followed by the call duration.

The consecutive calls made or received from the same number are grouped together, and the number of calls is displayed next to the contact name. The badge on the Recent tab indicates the number of missed calls.

- **Voicemails**—Use the Voicemails tab to view your new, flagged, and deleted voicemails. The badge on the Voicemails tab indicates the number of unheard voicemail messages.
- **Messages**—Use the Messages tab to view your chat logs. Click any chat from the logs to open the conversation details in the third pane. The badge on the Messages tab indicates the number of unread messages.



Note

The badge on the Connect client icon on your computer task bar indicates the total number of new missed calls and unheard voicemail messages.

- **Events**—Use the Events tab to view your past and upcoming calendar appointments. To view your Outlook appointments, synchronize your Connect client with Microsoft Exchange.
- **Workgroups**—Use the Workgroups tab to view active workgroup calls for a user and the current workgroup state of the user. To view information about workgroups, you must be a member of a workgroup and have the appropriate license type.



Note

The Workgroup feature is available only for Connect ONSITE users.

You can expand or collapse the dashboard view by clicking the up/down arrow icon. In collapsed view, you can mouse hover on each icon to view the tool tip.

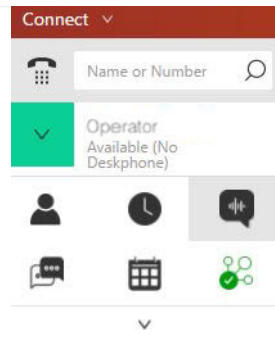



Figure 2: Dashboard Collapsed View



- **Notification**—The Notification area shows incoming calls, voicemail messages, events, or error messages.
- —This icon indicates that the connection to the Connect server is secure, and the client is sending encrypted data. When this icon is yellow, it indicates that the connection is not secure, and the client is sending either encrypted or unencrypted data. Hover over the icon to view the tool tip.
- **Second Pane**—The second pane displays information based on what you select on the dashboard.
- **Third Pane**—The third pane displays information based on what you select on the second pane. For example, if you click a contact on the second pane, the third pane displays the contact card, the conversation history, and the IM input field for interacting with the selected contact.
 - **Contact Card**—View the details of the selected contact.
 - **Conversation History**—View the history for the selected contact.
 - **IM Input Field**—Type your instant messages to the selected contact.

Click the minimize button at the top-right corner of a pane to close the pane.

Pinning Tabs for Quick Access

You can pin a tab to the dashboard for quick access. The pinned tab remains open in the second pane with the dashboard. While navigating through the other tabs, you can view the pinned tab in the second pane after you close the open tabs. You can pin only one tab to the dashboard.

To pin a tab to the dashboard:

1. On the dashboard, select the tab.
2. Click  icon. To unpin the tab, click  icon.

Docking the Connect Client

You can dock the Connect client to keep it always on top when navigating through other applications.

For Windows:

1. On the client menu bar, click the **Connect** drop-down.
2. Select **Always On Top**.

For Mac OS:

1. On the Mac menu bar, click **Window**.
2. Select **Always On Top**.

Adding Shortcuts to the Client Toolbar



Note

This feature is available only for ONSITE users.

From the client toolbar, you can add shortcuts for your most used or preferred operations. The configured buttons function as shortcuts to access operations that require more actions to accomplish the same task. You can use these shortcut buttons to perform a one-click operation for monitoring a call, starting a voice recording, opening the agent queue monitor, activating the softphone, or any other option defined by your organization.

To enable this feature, your administrator must first configure the Client Toolbars programmable buttons in Connect Director for each user.

The list of configured shortcuts is displayed in a client window. To view or hide the client toolbar from the Connect client, click the **Connect** drop-down on the client menu bar and toggle **Show Toolbar**.

To select which shortcut buttons are displayed in your client toolbar:

1. Click **+** icon at the bottom right of the toolbar panel.
2. Select the buttons to add to the toolbar panel.



Note

You can add up to 140 buttons to the client toolbar.

You can drag and drop to re-order the buttons. The keyboard shortcuts to the first 10 buttons are auto-assigned based on your order on the client toolbar. For Mac OS, use CMD+0-CMD+9, and for Windows, use ALT+0-ALT+9 as keyboard shortcuts. You can hover the mouse over the buttons to view the tool tip. For a Monitor Extension button, you can also view the availability state of the extension that you are monitoring.

Selecting Preferred Language

You can select the language for your desk phone and the Connect client interface.

1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences** and click **Language**.

For Windows, click **Settings** and click **Language**.



Note

If you have an operating system in Spanish, French, German, or Simplified Chinese, the Connect client uses the same language of the operating system. For other languages, the Connect client uses English as the default language. The Mitel collaboration for Web page always uses the same language as that of the operating system, regardless of the language selected in preferences.

3. From the **Deskphone & voicemail menus** drop-down list, select the desired language for your desk phone.
4. From the **I want to use this application in** drop-down list, select the required language for the Connect client interface.

You must exit and restart the client for the change to take effect.

Setting a Sound Notification

You can create a sound notification to identify a specific event, such as a voicemail, a call from an internal or external number, a monitored call, a shared call, or to identify a new or an existing conversation.

1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Notifications > Sounds**.
4. In the **Audio Alerts** field, select **ON**.

5. In the **For event** field, click the drop-down list on the right, and select any of the following:
 - new voicemail
 - call from an internal number
 - call from an external number
 - new IM message initiating a new conversation
 - new IM message initiating an existing conversation
 - monitored call
 - shared line call
6. Select **Play alert**, click the drop-down list on the right, and select a required sound from the list.

**Note**

Other than the default list of sounds, you can also add or remove a new .wav file.

Connect Client Logs

The Connect client creates a log file each time you log in. The logs are used to help Technical Support with debugging problems that may arise during the operation. You can send the log files to your Connect Administrator while opening a troubleshooting ticket.

To send the client log files:

- For Windows:
 1. On the Connect Menu Bar, click the **Connect** drop-down list.
 2. Select **Send Client Logs** and follow the on-screen instructions.
- For Mac OS:
 1. On the Mac menu bar, click the **Help** tab.
 2. Select **Send Client Logs** and follow the on-screen instructions.

Sharing Data with Mitel

The Connect client sends the user interaction data anonymously to Mitel by default. The data is analyzed by technical support for enhancing the Connect client application.



Note

All anonymous data is encrypted and cannot be traced back to the user.

To disable sending user interaction data to Mitel:

1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Account > Access**.
4. Clear the **Yes, I want to help ShoreTel build better products! Send anonymous data to ShoreTel** check box.

You must exit and restart the Connect client for the change to take effect.

CHAPTER

3

Managing Contacts

This chapter provides information on how to manage your contacts.

Managing Contacts	24
Adding a Contact on Mac OS	25
Adding a Contact on Windows	25
Viewing Information of a Contact.....	26
Importing the Contact Folders	27
Deleting a Contact	28
Adding a Contact to your Favorites List.....	28
Viewing Favorites	29
Searching Contacts	29
Sorting Contacts	29
Viewing Call Stack Information of a Contact.....	29
Managing Contact Groups	30
Creating a Contact Group	30
Reordering the List of Contact Groups	30
Editing or Deleting a Contact Group	30

Managing Contacts

The Connect client enables you to organize and manage your contacts.

To view the system directory that shows all the contacts in your organization, click in the **Quick Dialer Search** bar. The contact names with special characters and numbers are displayed first, and followed by names in the alphabetical order by the last name with alpha headers.

To find a contact, type any of the following in the **Quick Dialer Search** bar:

- First Name
- Last Name
- Email address
- Company name
- Extension number
- Double token (single letter and double letter of the contact's name). For example, you can type P R or Pa Ro to search for Patrick Roberts.

Figure 3 describes the process of adding a contact and viewing the contact's information.

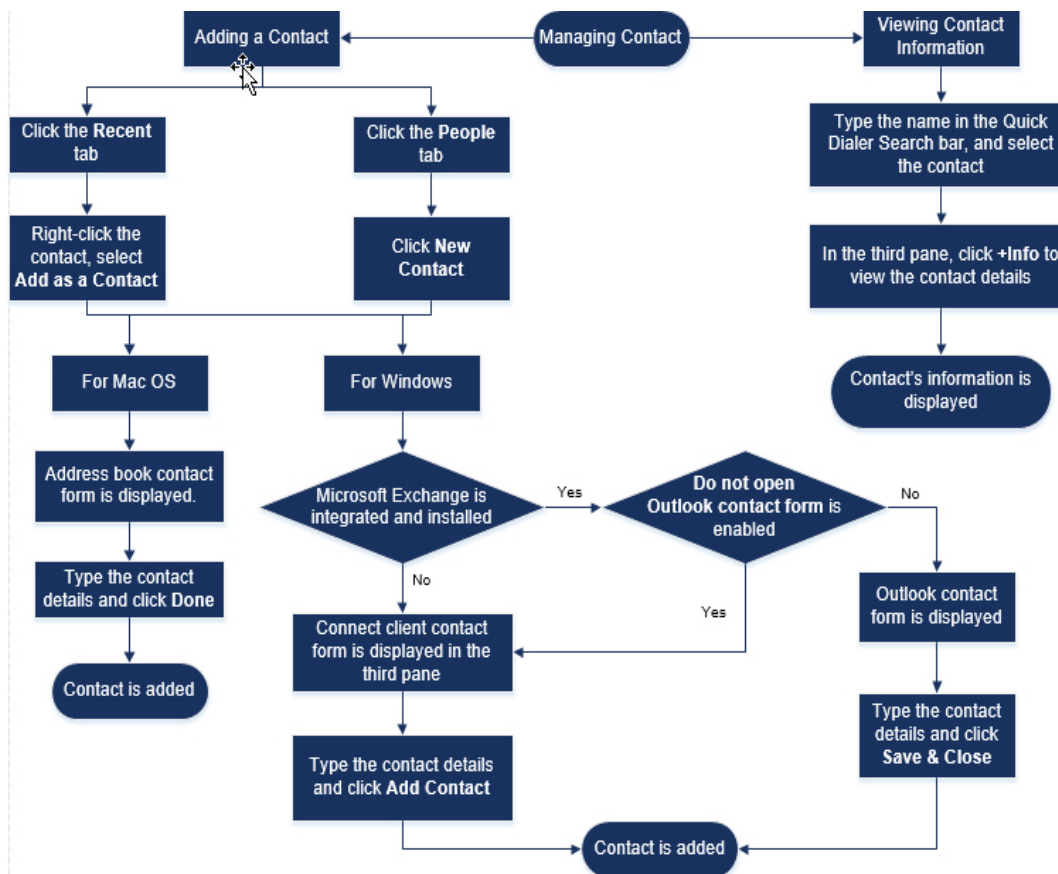



Figure 3: Managing Contacts

Adding a Contact on Mac OS

1. Do one of the following:

- Click the **Recent** tab, right-click the contact, and select **Add As a Contact**.
- Click the **People** tab and click  at the top right corner of the second pane, and then select **Add Contact**.

The address book contact form is displayed.



Note

The address book opens only if you have enabled the Connect client in the System Preferences on your Mac.

2. Type the contact details in the required fields.

3. Click **Done**.

Adding a Contact on Windows

You can add a new contact using the Microsoft Outlook contact form and the Connect client contact form.




Note

You can add a new contact through Outlook contact form only if:

- Your Connect administrator has configured the Microsoft Exchange account on the Connect Director.
- Microsoft Outlook is installed on your computer.

To add contact using the Microsoft Outlook contact form:

1. Do one of the following:

- Click the **Recent** tab, right-click the contact, and select **Add As a Contact**.
- Click the **People** tab and click  at the top right corner of the second pane, and then select **Add Contact**.

An Untitled Outlook Contact form is displayed.

2. Type the contact details in the required fields.

3. Click **Save & Close**.


**Note**

If you have installed the Microsoft Outlook on your computer, the Outlook contact form opens by default when adding a new contact. However, you can set the Connect client to open the Connect contact form instead of Outlook contact form.

To open the Connect contact form instead of Outlook contact form when adding a contact:

1. On the dashboard, click the **<username>** tab.
2. Click **Settings** and click **Outlook**.
3. Select the **Do not open Outlook when adding contact to Connect** option.

To add a new contact using the Connect contact form:

1. Do one of the following:
 - Click the **Recent** tab, right-click the contact, and select **Add As a Contact**.
 - Click the **People** tab and click  at the top right corner of the second pane, and then select **Add Contact**.

The Contact form opens in the third pane.

2. Type the contact details in the required fields.
3. Click **Add Contact**.

Viewing Information of a Contact

1. In the **Quick Dialer Search** bar, type the contact name or extension number and select the contact.
 - By default, the system directory search results are displayed.
 - If you have enabled the **Enable searching for contacts in my exchange public contact folders** option, you can view the search results from **Direct Matches** and **Exchange Public Matches**.
 - By default, the Connect client displays the search results from **Direct Matches**.
 - To search for a contact from your Exchange Public folders, click **Exchange Public Matches**. From the drop-down list, select the folder, and the contact.


The Contact card opens on the third pane.





**Note**

For more information about the **Enable searching for contacts in my exchange public contact folders** option, see [To enable searching for the contact from the Exchange Public Contact folders](#): on page 85.

2. In the Contact card, click **+ Info** to view the contact's details and click **- Hide Info** to hide the contact's details.

To see the company name, department name, and phone number of a contact:

- From the **Quick Dialer Search** bar:
 - a. Right-click the contact on the second pane.
 - b. Select the **Show Company Name**, **Show Department Name**, and **Show Phone Number** options to view or hide the contact information.
- From **Favorites** and **Groups**:
 - a. On the second pane, click .
 - b. Select the **Company Name**, **Department Name**, and **Phone Number** options to view or hide the contact information.

The phone numbers of the contact are displayed in the order: Extension () , Business or Work () , Mobile () , and Home () . If a contact has configured all the four phone numbers on the Connect client, by default, the first two phone numbers in the order get displayed in the second pane.

To view all the phone numbers, click **More**. The Contact card opens in the third pane with **+ Info** expanded where all the phone numbers of the contact are displayed.



Note

The **More** option is displayed only if the contact has configured more than two phone numbers.

Importing the Contact Folders

For Mac OS, you can import the contact folders from the Mac address book into the Connect client. If the Microsoft Outlook is installed on your computer, the Mac address book synchronizes with the Microsoft Outlook or Office 365 contact folders.

To import the contact folders from the Mac address book:



Note

You must enable the Connect client in the System Preferences on your Mac to import the contacts from the Mac address book.

1. On the dashboard, click the **<username>** tab.
2. Click **Preferences**.
3. Click **Contacts/Outlook**.
4. Select **Sync my Mac Contacts** option.

5. Click **+Show contact folders** and select the folders that you want to import into the Connect Client.

For Windows, if you have integrated the Connect client with Microsoft Exchange, you can import the contact folders from Microsoft Outlook or Office 365 into the Connect client. For information about importing the contact folders from Microsoft Outlook or Office 365 into the Connect client, refer to [Synchronizing the Connect Client with Microsoft Outlook or Office 365 Contact Folders](#) on page 84.

Deleting a Contact

To delete a contact from Connect client when it is not integrated with Outlook:

1. In the **Quick Dialer Search** bar, type the contact name or extension.
2. Click the name of the contact that you want to delete.
3. Click **+ Info** below the profile picture.
4. Click **Delete Contact**.
5. In the confirmation dialog box, click **Delete**.



Note

You can delete only the external contacts that you have added to the Connect client. However, you cannot delete contacts available through the system directory of your organization.

You can delete the contacts imported from the Outlook all at once using the Connect client interface.

To delete the contacts imported from Outlook:

1. On the dashboard, click **<username>** tab.
2. For Mac OS, click **Preferences > Contacts/Outlook**.

For Windows, click **Settings > Outlook**.

3. Click **Remove Synced Contacts**.
4. In the confirmation dialog box, click **Remove**.



All your contacts imported from Outlook are deleted at once. The **Remove Synced Contacts** option is disabled and the **Sync my Outlook contacts** option is cleared.

Adding a Contact to your Favorites List

1. In the **Quick Dialer Search** bar, type the contact name or extension.
2. Click the **Star** icon next to the contact name that you want to mark as a favorite.
3. To remove the contact from the favorites list, click the **Star** icon next to the contact name again.

Viewing Favorites

1. Click the **People** tab on the dashboard.
2. Click the **Favorites** tab on the second pane to view the list of contacts marked as favorites.

In Favorites and Groups lists, you can see the contacts in **List** mode and **Compact** mode. On the second pane, click  to view in List mode, and click  to view in Compact mode.

- List Mode: The contact's name, extension number, phone number, department name, and availability status are displayed.
- Compact Mode: The contact's name and availability status are displayed.

Searching Contacts


You can search the contacts added to your Favorites or Group. To search a contact, enter the contact's name, or extension in the **Search** field in the Favorites or Group tab.

For more details about viewing information of a contact, refer to [Viewing Information of a Contact](#) on page 26.

Sorting Contacts

You can sort the contacts in your Favorites and Groups list by last name, first name, availability state, and last contact.

To sort your contacts in Favorites or Groups:

1. On the dashboard, click **People > Favorites**.
2. On the second pane, select **Favorites** or **Groups**.
3. Click  and select one of the following:
 - Last Name
 - First Name
 - Availability
 - Last Contact


Viewing Call Stack Information of a Contact

You can view the availability state and call stack information of a contact if the contact is added to your Favorites or Groups list.

To view the call stack information, do one of the following:

- Click **People > Favorites** or **Groups**. Hover on a contact to view the tool tip.


Tool tip displays the contact's availability state and call stack information.

- Open the contact card and click  next to the contact name to view the contact's availability state and call stack information.

You can answer the Incoming calls, Parked calls, and On Hold calls from the contact's call stack. To answer a call from the call stack of a contact, refer to [Answering Call from Call Stack of a Contact](#) on page 49

Managing Contact Groups

Creating a Contact Group


1. On the dashboard, click the **People** tab.
2. On the second pane, click  and select **Add Group**.
3. In the **Name** field, type the group name.
4. In the **People** field, do one of the following:
 - Type the contact name and select the contact.
 - In the **Quick Dialer Search** bar, type the contact name or number, and then drag the contact from the search results to the **People** field.
5. Click **Save Changes** to save the group, or **Cancel** to discard.

Reordering the List of Contact Groups

1. Click the **People** tab on the dashboard.
2. Click the **Groups** tab to view all the groups created.
3. Click the group header and drag it to the required position.

Any changes to the order of groups is persistent between the client restarts.

Editing or Deleting a Contact Group

1. On the dashboard, click **People > Groups**.
2. Click  on the group header you want to edit.

3. Click **Edit Group**.
4. In the **Name** field, edit the group name.
5. In the **People** field:
 - To add a contact to the group, type the contact name and select the contact.

**Tip**

Type the contact name or the number in the **Quick Dialer Search** bar, and right-click the contact on the second pane, and select **Add Contact to Group** to add the contact to the required group.

- To remove a contact from the group, click **x** next to the contact.
 - To reorder the contact names, select a contact, drag the selected contact to the required order.
6. Click **Save Changes** to save your changes, or **Cancel** to discard the changes.

To delete the group, click **Edit Group > Delete Group**. In the confirmation dialog, click **Delete**.

CHAPTER

4

Managing Availability States

This chapter provides information about managing availability states for users and their contacts.

Understanding Availability States	34
Setting Alert for Contact's Availability State	35
Changing Availability State.....	36
Selecting a Predefined Availability State	36
Configuring a Custom Availability State.....	36
Allowing a Contact to Manage your Availability State	37

Understanding Availability States

You can check or verify the availability status of a contact on the Connect client before communicating with that contact. The Connect client automatically updates the availability status of users as they make and receive calls. When integrated with Microsoft Exchange, the Connect client also displays users' meeting status.

You can monitor the availability of up to 500 contacts. This can be configured by your Connect administrator.

The different availability states are described in [Table 2](#).

Table 2: Availability States

Color	State	Predefined/ Customizable	Description
Green	Available	Predefined	The contact is available for a call or IM session.
Yellow	In a Meeting	Predefined	The contact is in a meeting, but you can still reach the contact through an IM session. If you dial this contact, the call will be routed to the contact's voicemail inbox or to the number configured using the availability routing as explained in Routing Calls on page 66.
Red	Out of Office	Predefined	If you dial this contact, the call will be routed to the contact's voicemail inbox or to the number configured using the availability routing, as explained in Routing Calls on page 66.
Red	Do Not Disturb	Predefined	The contact is busy and does not wish to be reached. However, you can reach this contact through an IM. If you dial this contact, the call will be routed to the contact's voicemail inbox or to the number configured using the availability routing, as explained in Routing Calls on page 66.
Red	Vacation	Predefined	If you dial this contact, the call will be routed to the contact's voicemail inbox or to the number configured using the availability routing, as explained in Routing Calls on page 66.
Gray	Custom...	Customizable	The contact has a custom status, depending on the configured option. If you dial this contact, the call will be routed to the contact's voicemail inbox or to the number configured using the availability routing, as explained in Routing Calls on page 66.

Table 2: Availability States

Color	State	Predefined/ Customizable	Description
Orange	Ringing	Predefined	When you receive an incoming call, the availability state flickers and changes to orange.
	On the Phone	Predefined	When you answer an incoming call, the availability state changes to orange. When you are already on a call and receive another incoming call, the availability state starts flickering and changes to Ringing.

Setting Alert for Contact's Availability State

If you want to communicate with a contact who is currently not in Available state, you can set the Connect client to notify you when the contact's status changes to Available.

To receive a notification:

1. In **Quick Dialer Search** bar, type the contact name or extension, and select the contact.
2. In **Contact Card**, click the drop-down list on the top-right corner and select **Alert When Available**.

Also, if the contact is added to your Favorites or Groups list, right-click the contact in Favorites or Groups tabs, and select **Alert When Available**.

You can set the alert only for the contacts available through the system directory of your organization. However, you cannot set this alert for any external contacts that you have added to the Connect client.



Note

Alerts are disabled when the Connect client restarts.

Changing Availability State

The Connect client automatically updates your availability state when you use the system, but you can select a predefined availability state or configure a custom availability state.

Selecting a Predefined Availability State

1. From the dashboard, click the drop-down menu to the left of the **<username>** tab.
2. Select one of the following availability states:
 - Available
 - In a Meeting
 - Out of Office
 - Do not Disturb
 - Vacation

Configuring a Custom Availability State

1. From the dashboard, click the drop-down menu to the left of the **<username>** tab.
2. Click the **Custom** availability state and click the color in the list.
 - Available (Green)
 - Busy (Yellow)
 - Not Available (Red)



Note

The color of the availability state cannot be customized.

3. Enter your custom status in the **Type a status** field, and press **Enter**.

The custom availability status and color is displayed on the **<username>** tab.



Note

To view your availability state in Microsoft Outlook after integration with the Connect client, ensure that you launch the client before launching Outlook on Windows.

Allowing a Contact to Manage your Availability State

You can configure a contact to manage your availability state on the Connect client.

To manage your availability state, the contact must meet the following requirements:

- The contact must have added you to a contact group.
- The contact must have a Workgroup Supervisor or Operator license type and be configured with a specific class of service in Connect Director.



Note

The Workgroup feature is available only for Connect ONSITE users.

To allow access to a contact to manage your availability states:

1. On the dashboard, click the **<username>** tab.
2. For MAC OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Account > Access**.
4. Type in the contact name for whom you want to allow access, and close the page. The contact is configured to change your availability state until you revoke access by removing the contact from the **Access** page.

CHAPTER

5

Managing Phones

This chapter provides information about managing your desk phone, softphone, and external phones.

Managing your Desk Phone.....	40
Assigning your Desk Phone	40
Customizing your Desk Phone	40
Removing the Desk Phone Assignment	40
Using the Softphone.....	41
Assigning Softphone.....	41
Customizing the Softphone	42
Assigning External Phones	42

Managing your Desk Phone

This section provides information about assigning a desk phone to your Connect client.

Assigning your Desk Phone

1. On the desk phone, press the **Assign** soft key.
2. In the **Extension** field, enter your assigned extension number, and press **Next** or the down key.
3. In the **Voicemail password** field, enter your voicemail password, and press **OK** or the **#** key.
4. Verify the desk phone status in the Connect client as follows:
 - a. Launch the Connect client.
 - b. Verify the status on the dashboard:
 - If the **<username>** tab displays the status as **Assigned Deskphone**, then the desk phone is successfully assigned.
 - If the **<username>** tab displays the status as **No Deskphone**, then repeat steps 1 to 3.
 - c. Verify the desk phone status on the second pane:
 - Click the **<username>** tab to display the second pane.
 - Click the **Primary Assignment** tab, and verify that the **deskphone** option is displayed.

Customizing your Desk Phone

1. On the dashboard, click the **<username>** tab.
2. For MAC OS, click **Preferences**.
For Windows, click **Settings**.
3. Click the **Deskphone** tab to display the desk phone options.
 - In the **Wallpaper** field, in the drop-down list, select the preferred wallpaper.
 - In the **Ringtone** field, in the drop-down list, select the preferred ringtone.

Removing the Desk Phone Assignment

1. On the dashboard, click the **<username>** tab.
2. Click the **Primary Assignment** tab.

3. To reset the current extension assignment, click **Go Back To My Desk Phone**.

The deskphone option is removed from the **Primary Assignment** tab. The corresponding extension number is also unassigned from the desk phone.

Using the Softphone

When you select softphone as your primary assignment, incoming calls are routed to the Connect client. The desk phone functionality is disabled until you assign your desk phone again to the Connect client.



Note

If you are a Connect CLOUD user, then you must have a DID number assigned to your account to use the Softphone feature in the Connect client.

Assigning Softphone

1. On the dashboard, click the **<username>** tab.

2. For MAC OS, click **Preferences**.

For Windows, click **Settings**.

3. Click the **Primary Assignment** tab, and select **softphone**.

If the Softphone option is not displayed, contact your Connect administrator.

4. Select one of the following from the drop-down list:

- Default
- Internal Microphone
- Headset Microphone (Plantronics Device)

The Plantronics device option is shown in the drop-down list only after you plug in the Plantronics headset to your computer.

After the softphone is successfully assigned, the **<username>** tab on your dashboard displays **Softphone** next to the status.

Customizing the Softphone

1. On the dashboard, click the **<username>** tab.
2. For MAC OS, click **Preferences**.
For Windows, click **Settings**.
3. Click the **Softphone** tab to display the softphone options.
If you do not see the Softphone tab, contact your Connect administrator.
4. To switch to a different audio device, in the **Capture audio through** field, click the drop-down list, and select the preferred audio device.
If required, plug your audio device into the computer's headset port or use the computer's built-in speakers.
5. Select **On startup assign me to my softphone** to handle calls and voicemails on the softphone from the time you first log in to the client.
6. Select **Enable auto gain control** to enable the automatic control.

Assigning External Phones

1. On the dashboard, click the **<username>** tab.
2. Click the **Primary Assignment** tab, and select **external assignment number**.
3. Click the **Select Number** drop-down list.
If you do not see the Select Number option, contact your Connect administrator.
4. Type a name in the **Label** field (for example, Home or Mobile).
5. Enter the associated phone number in the **Number** field.
You cannot use a phone number that is assigned to Connect for iOS or Android.
6. To choose a method to connect to the external number, click the drop-down list and select one of the following options:
 - Automatically connect
 - Press 1 to connect

7. In the **rings to try** field, increase the number of rings to 6 or more to the external phone number before forwarding the call to your voicemail.



Note

In **Call Routing** settings, you must set the **rings before incoming calls are routed to the voice mail** option to the number of rings that you set in the **rings to try** field. (Follow the steps 10 to 14 to set the number of rings in Call Routing.)

8. Select a number that you have defined as an external number.
9. Click **Use Selected Number** to change your assigned phone to the configured number.
10. Click the **<username>** tab, and then click **Preferences** for MAC OS or **Settings** for Windows.
11. Click **Call Routing > Availability Routing**.
12. Click **Change** next to the **rings before incoming calls are routed to the voice mail** routing option.
13. Select 6 or more rings from the **rings before forwarding** drop-down list.
14. Click **Save**.

CHAPTER

6

Managing Calls

This chapter provides information about making voice calls and using related features in the Connect client.

Making a Voice Call.....	47
Answering a Voice Call	48
Managing Incoming Call Notifications.....	49
Answering Call from Call Stack of a Contact	49
Viewing Call Interaction History with a Contact.....	50
Transferring a Call.....	50
Transferring a Call Using the Transfer Option	51
Transferring a Call Using the Consult Option	52
Parking a Call	53
Transferring a Call Using the Intercom Option	54
Transferring a Call Using the Whisper Option	54
Transferring a Call to Voicemail	55
Making a Conference Call.....	55
Creating a Blind Conference Call	56
Creating a Consultative Conference Call.....	56
Creating an Intercom Conference Call	56
Managing Call Notes and Viewing Routing Slips	57
Making a Video Call	59
Setting Up Video Camera Preferences.....	59
Managing Voicemail	60
Forwarding Calls to your Voicemail Inbox.....	60
Leaving a Voicemail Message	61

Accessing Voicemail Messages	61
Viewing Voicemails from a Contact	61
Listening to a Voicemail Message	62
Saving a Voicemail Message.....	62
Replying to a Voicemail Message.....	62
Forwarding a Voicemail Message.....	63
Deleting a Voicemail Message	63
Restoring a Deleted Voicemail Message.....	64
Configuring Email Notifications for Voicemail Messages.....	64
Managing System Notifications for Voicemail Messages	64
Changing your Voicemail Password	65
Recording Voicemail Greeting Name.....	65
Playing Envelope Information for Voicemail	65
Routing Calls.....	66
Availability Routing	66
Using Power Routing.....	70
Routing Calls to Mobile.....	73
Customizing your Call Option Settings.....	73

Making a Voice Call

You can make a call from:


- Quick dialer search bar
- Directory
- Recent
- Dial pad

To make a call from the quick dialer search bar or from the system directory:

1. Type the contact details in the quick dialer search bar on the dashboard.

Enter the first or last name, extension, company name, department name, phone number, or an email address of the person you would like to search for. For more information about searching for a contact, refer to [Viewing Information of a Contact](#) on page 26.


2. Do one of the following:

- Double-click the contact in the second pane.
- Click the contact, and click  in the third pane.


To make a call from history:

1. Click the **Recent** tab on the dashboard.

2. Do one of the following:

- Double-click the contact in the second pane.
- Click the contact, and click  in the third pane.

To make a call from the dial pad:

1. Click  on the dashboard.
2. Enter the extension or the mobile number, and press enter.

Answering a Voice Call

The Connect client displays a call notification on the dashboard for every incoming call. If you have enabled the system notification for incoming calls, the Connect client also displays a system notification with the following information:

- Name of the Contact. If the caller is not listed in the system directory of your organization, the name is displayed as Unknown.
- Phone Number
- Dialed Number Identification Service (DNIS) if available
- Huntgroup or Workgroup name, if the caller belongs to any. This is applicable only for ONSITE users.

To enable the system notification for an incoming call, refer to [Managing Incoming Call Notifications](#) on page 49.



To answer an incoming call, do one of the following:



- On the system notification, click **Accept** to answer or **Ignore** to send the call directly to voicemail.



Note

For users with Extension only license, only Accept button is displayed on the system notification.

- On the dashboard, click  to answer, and click  to directly transfer the call to voicemail.

To reject the call and respond through IM, click  and type the message or select the canned message, and click **Send**. Click  to end the active call.

- To answer a call using the Plantronics headset:







Note

You must install the Plantronics hub. If you do not install the Plantronics hub or the hub is down, the headset acts as a normal audio device, and you cannot use the headset buttons to perform call functions. To download and install the Plantronics hub software, refer to the Plantronics website.

- Set your extension to Softphone. (For more information, see [Assigning Softphone](#) on page 41.)
- Press the call answer button on your headset.

You can use the call control functions available on your headset. For more information, refer to the Plantronics website.

You can place a voice call on hold and resume when required.

- In the call notification area, click  to place the call on hold and click  to resume.
- On the contact card, click  to place the call on hold and click  to resume.

Managing Incoming Call Notifications

To receive a system notification for an incoming call:

1. On the dashboard, click the <username> tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Notifications > Popup**.
4. To enable notifications, select the **Show a system notification for an incoming Call** check box.
5. In **Keep notification on screen for** field, select the time from the drop-down list.

Answering Call from Call Stack of a Contact




Note

This option is available only if your Connect administrator has enabled the **Allow Call Pick Up** option in Connect Director.

You can answer incoming calls, parked calls, and calls on hold from a contact's call stack.

To answer a call:

1. View the call stack of a contact. Refer to [Viewing Call Stack Information of a Contact](#) on page 29 for information about call stacks.
2. Click  beside the call you want to answer.

When you answer a call from the contact's call stack, the answered call is removed from the contact's call stack and appears on your call stack.

Viewing Call Interaction History with a Contact

1. In the **Quick Dialer Search** bar, type the name or extension number and select the contact.
2. In the third pane, click the drop-down list in the **Search** field and select **Calls**.

Your call history with the selected contact is displayed in the third pane. Click each call entry to view the call origin, the call duration, the call routing slip, and to enter a call note.

If you select **Everything** in the drop-down list, your call history, voicemail history, and instant message conversation history with the contact are displayed in the third pane.

Transferring a Call

The Connect client allows you to do the following kinds of transfer operations or other actions related to transfers:

- Blind Transfer
- Consultative transfer
- Park
- Intercom
- Whisper
- Voicemail

Figure 4 describes the different types of call transfer options; Transfer, Consult, Park, Intercom, Whisper, and Voicemail options.

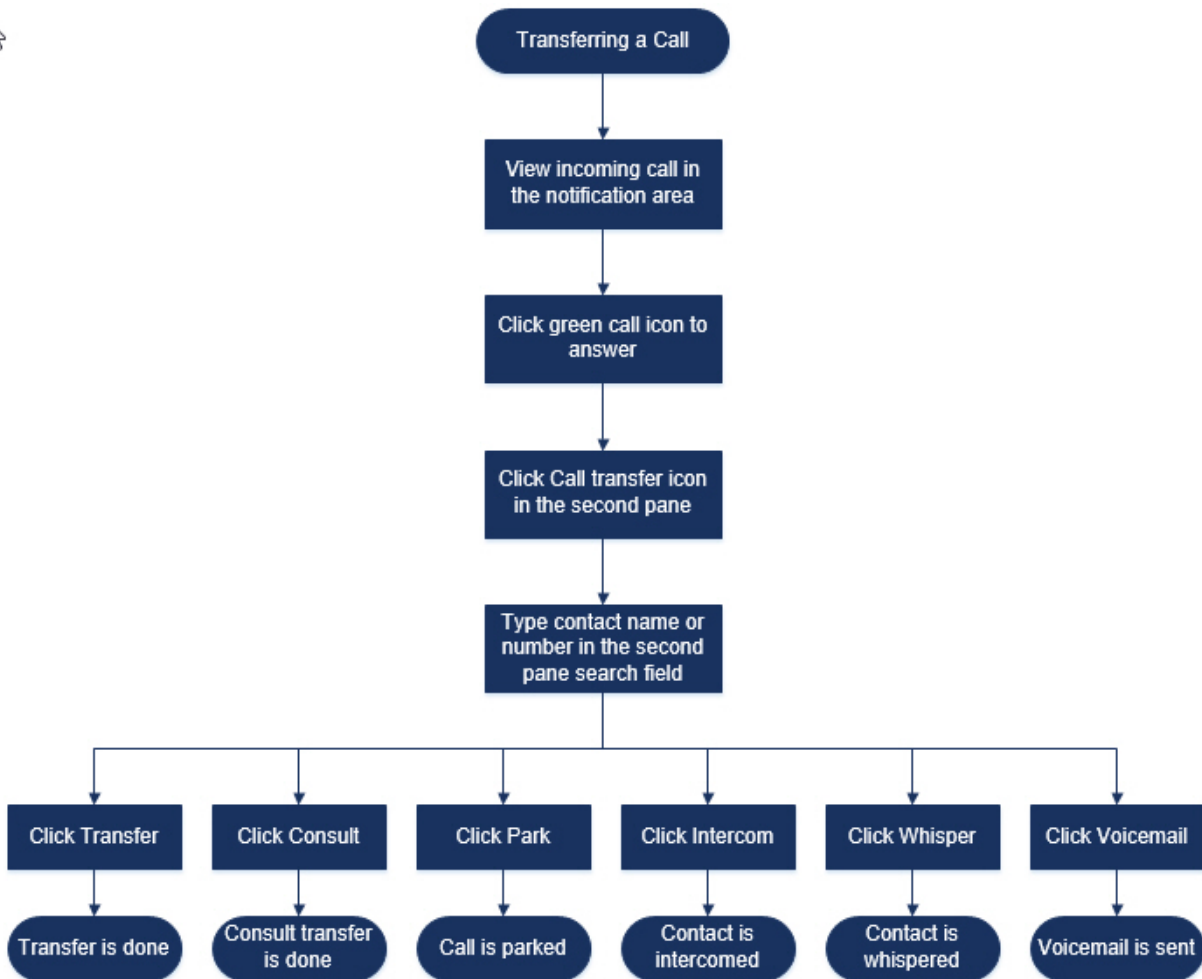


Figure 4: Transferring a Call

Transferring a Call Using the Transfer Option

You can use the transfer option to transfer a call to another extension without actually initiating a call to the end destination. The call is blindly transferred to the other user. You can do the blind transfer using the drag and drop option, the contextual menu, and from the call notification area.



Note

You can do the blind transfer either before or after answering a call. To answer a call, see [Answering a Voice Call](#) on page 48.




To do a blind transfer using the drag and drop option:

1. In the **Quick Dialer Search** bar, type the contact name or the extension number.
2. On the dashboard, drag the call from the call notification area and drop it on the contact in the second pane.




To do a blind transfer using the contextual menu:

1. In the **Quick Dialer Search** bar, type the contact name or the extension number.
2. Drag the call from the call notification area and hover over the contact for two seconds to view the contextual menu. Select **Blind transfer** from the contextual menu to complete the call transfer.

To do a blind transfer from the call notification:

- Before answering the call:
 - a. On the dashboard, click  in the call notification.
 - b. In the second pane search field, type the contact name or the phone number.
 - c. Click **Transfer**.
- After answering the call:
 - a. On the dashboard, click  in the call notification.
 - b. In the second pane, click  .
 - c. In the second pane search field, type the contact name or phone number.
 - d. Click **Transfer**.

Transferring a Call Using the Consult Option



- Before answering the call:
 - a. On the dashboard, click  in the call notification.
 - b. In the second pane search field, type the contact name or the phone number.
 - c. Click **Consult**.
- After answering the call:
 - a. On the dashboard, click  in the call notification.
 - b. In the second pane, click  .

- c. In the second pane search field, type the contact name or phone number.
- d. Click **Consult**.

Parking a Call


You can park a call using the contact card or the contextual menu. If the call is not answered at the specified extension, the call is returned to you with the routing slip indicating that you have already spoken to this caller.

To park a call using the contact card:

1. Answer an incoming call. (To answer a call, see [Answering a Voice Call](#) on page 48.)
2. In the second pane, click .
3. In the second pane search field, type the contact name or phone number.
4. Click the **Park** option.
5. Click  to park the call.



To park a call using the contextual menu:

1. Answer an incoming call. (To answer a call, see [Answering a Voice Call](#) on page 48.)
2. In the **Quick Dialer Search** bar, type the contact name or number and select the contact.
3. Drag the active call in the notification area and hover over the selected contact for two seconds to view the contextual menu.
4. Select **Park** from the contextual menu to complete the call transfer.

 appears next to the contact name indicating that the call is parked on the contact's call stack.

Park and Page



To park a call and page a contact:

1. Answer an incoming call. (To answer a call, see [Answering a Voice Call](#) on page 48.)
2. In the second pane, click .
3. In the second pane search field, type the contact name or phone number.
4. Click the **Park** option.
5. Click  to park and page the call.




Park and Intercom

You can use the park and intercom option to place an intercom call in which the recipient phone automatically answers with mute activated and broadcasts your message through the recipient's speaker phone, headset, or handset.


To park and intercom a call:



1. Answer an incoming call. (To answer a call, see [Answering a Voice Call](#) on page 48.)
2. In the second pane, click .
3. In the second pane search field, type the contact name or phone number.
4. Click the **Park** option.
5. Click  to park the call and place an intercom call to the selected contact.

Transferring a Call Using the Intercom Option


- Before answering the call:
 - a. On the dashboard, click  in the call notification.
 - b. In the second pane search field, type the contact name or the phone number.
 - c. Click **Intercom**.
- After answering the call:
 - a. On the dashboard, click  in the call notification.
 - b. In the second pane, click .
 - c. In the second pane search field, type the contact name or phone number.
 - d. Click **Intercom**.

Transferring a Call Using the Whisper Option



- Before answering the call:
 - a. On the dashboard, click  in the call notification.
 - b. In the second pane search field, type the contact name or the phone number.
 - c. Click **Whisper**.

- After answering the call:
 - a. On the dashboard, click  in the call notification.
 - b. In the second pane, click  .
 - c. In the second pane search field, type the contact name or phone number.
 - d. Click **Whisper**.

Transferring a Call to Voicemail

On the dashboard, click  in the call notification to transfer the call directly to your voicemail without answering the call.

To transfer the call to another contact's voicemail:

1. On the dashboard, click  in the call notification to answer the call.
2. In the second pane, click  .
3. In the second pane search field, type the contact name or phone number.
4. Click **Voicemail**.

Making a Conference Call


A conference call involves more than two parties connected in a call. The number of people you can conference together in a call depends on your system configuration. Contact your Connect administrator for the details about your system's conference capabilities.

You can set up a conference call using either of the following approaches:

- In a blind conference call, you conference the people together without the other person first answering your call.
- In a consultative conference call, you talk to the person before adding that person to the conference call.

Creating a Blind Conference Call

To do a blind conference using the contact card:


1. Answer an incoming call. (To answer a call, see [Answering a Voice Call](#) on page 48.)
2. In the second pane, click  .
3. In the second pane search field, type the contact name or extension and click **Conference**.

To do a blind conference using the contextual menu:

1. Answer an incoming call. (To answer a call, see [Answering a Voice Call](#) on page 48.)
2. In the quick dialer search bar, type the contact name or number and select the contact.
3. Drag the active call in the notification area and hover over the selected contact for two seconds to view the contextual menu.
4. Select **Conference Blind** from the contextual menu to initiate the conference.

Creating a Consultative Conference Call

To do a consultative conference call:

1. Answer an incoming call. (To answer a call, see [Answering a Voice Call](#) on page 48.)
2. In the second pane, click  .
3. In the second pane search field, type the contact name or extension and click **Consult**.


The active call is placed on hold automatically, allowing you to consult the third person.

4. Click  to initiate the conference call.

Creating an Intercom Conference Call


You can add a participant to an active call by placing the active user on hold and then using the intercom conference feature to call the third user without ringing the phone line.

To do an intercom conference call:

1. Answer an incoming call. (To answer a call, see [Answering a Voice Call](#) on page 48.)
2. In the second pane, click  .

3. In the second pane search field, type the contact name or extension and click **Intercom**.

The active call is placed on hold, and the call to the third user is automatically answered on the phone line.

4. Click  icon to initiate a conference call.




Managing Call Notes and Viewing Routing Slips






Call note allows you and the other members on the call to add, view, and edit notes for an incoming call, a call that is on hold, and an active call.

Routing Slips displays the history and call routing details of the call.

[Table 3](#) describes the various call note and routing slip status for an incoming call, call on hold, and active call.

Table 3: Call Note and Routing Slip Status



Icon	Description
	Indicates that the return routing slip is open. This icon is displayed when the call that you parked is returned to you and when the routing slip is open.
	Indicates that the return routing slip is closed. This icon is displayed when the call that you parked is returned to you and when the routing slip is closed.
	Indicates that the routing slip is closed. To open, click the icon.

Icon	Description
	<p>Indicates that the routing slip is open.</p> <p>If there is only one call, by default, the routing slip of the call is open.</p> <p>If there are multiple calls, by default, the routing slip is open only for the oldest call on the dashboard. For the other calls, click the icon to open the routing slip.</p>
	<p>Indicates that the call note is closed and there is no text.</p> <p>To open, click the icon. You can add the text to the call note.</p>
	<p>Indicates that the call note is open and there is no text.</p> <p>You can add the text to the call note.</p>
	<p>Indicates that the call note is closed and it has text.</p> <p>To open, click the icon. You can then view or edit the text.</p>
	<p>Indicates that the call note is open and it has text.</p> <p>You can view or edit the text.</p>

To enable routing slips and call notes:


1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Telephony**.
4. Select **Show access to routing slip and call note for each call in the dashboard**.

The call stack displays routing slip and call note icons.

You can click  to view or hide the routing slip and click  to view or hide the call note for a call.





Note

By default, the routing slip is open for the oldest call on the dashboard. For the other calls, click  to open it.

Making a Video Call

To make a video call, the Primary Extension must be assigned to your Softphone. (For details about how to assign your extension to the softphone, see [Assigning Softphone](#) on page 41.)

1. Find and select a contact. (For more information, see [Managing Contacts](#) on page 24.)
2. To make a voice call, do one of the following:
 - In the third pane, click .
 - Double-click the contact to make a voice call.
3. To start broadcasting your video to the other party, click .
4. To end the video, click **Turn off Video Camera** icon.

Setting Up Video Camera Preferences

You can set up the Connect client to use the video camera:

- By default
- Prompt you to turn on the camera
- Wait for you to activate the camera manually, which lets you have complete control of your video camera.

To set up the video camera:

1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Video > Permissions**.

4. Select one of the following video options:
 - Automatically start my camera without asking
 - Ask me if I want to use my camera
 - Never ask me, I'll turn the camera ON myself
5. Click **Video > Camera Setup**, and select the video device from the drop-down list. (You can view a preview from the selected video device.)

Managing Voicemail

Callers can leave a voicemail message if a call is not answered. The voicemail message is delivered to your assigned desk phone, the Connect client, and your email inbox. This section includes the following topics:

- [Forwarding Calls to your Voicemail Inbox](#) on page 60
- [Leaving a Voicemail Message](#) on page 61
- [Accessing Voicemail Messages](#) on page 61
- [Viewing Voicemails from a Contact](#) on page 61
- [Listening to a Voicemail Message](#) on page 62
- [Saving a Voicemail Message](#) on page 62
- [Replying to a Voicemail Message](#) on page 62
- [Forwarding a Voicemail Message](#) on page 63
- [Deleting a Voicemail Message](#) on page 63
- [Restoring a Deleted Voicemail Message](#) on page 64
- [Configuring Email Notifications for Voicemail Messages](#) on page 64
- [Managing System Notifications for Voicemail Messages](#) on page 64
- [Changing your Voicemail Password](#) on page 65




Note

To alert you about an incoming voicemail message you can set an email notification or a system notification. For more information, see the following topics:

- [Configuring Email Notifications for Voicemail Messages](#) on page 64
 - [Managing System Notifications for Voicemail Messages](#) on page 64
-

Forwarding Calls to your Voicemail Inbox

When you receive an incoming call that you don't want to answer, click  in the notification area. The caller is directed to record a voice message.




After a caller leaves a voicemail message, you receive a badge notification on the Voicemail tab on the dashboard and on the Connect client icon on your computer task bar.

Leaving a Voicemail Message

1. Dial a contact. (For more information, see [Making a Voice Call](#) on page 47.)
2. When you are prompted to leave a voicemail message, record your message.

Accessing Voicemail Messages


Each voicemail displays the following:

- Name and number of the voicemail sender.
- Date on which the voicemail was received. If you receive it on the current day, "Today" is displayed instead of date.
- Duration of the voicemail.
- Icons to indicate Saved (), Private (), and Urgent () voicemails.

To access a voicemail message:

1. On the dashboard, click the **Voicemails** tab.
2. To access the voicemail messages for a specific category:
 - Click the **All** tab to view all (heard, unheard, and saved) the voicemail messages. The unheard voicemail messages are displayed in bold font, and preceded by a blue dot.
 - Click the **Unheard** tab to view the unheard voicemail messages.
 - Click the **Saved** tab to view the saved voicemail messages that you have marked for easy retrieval.

You can choose to reply, forward, or delete the received voicemails.

3. The **Deleted Voicemails** tab is displayed only if you have any deleted voicemail messages. To access the deleted voicemails, click  on the **Deleted Voicemails** header. By default, the Deleted Voicemail tab is in collapsed view and displays the number of deleted voicemails on the header.




From the Voicemail tab, you can add the contact from whom you have received a voicemail message to your Favorites or Groups list. Right-click the contact's voicemail message, and select **Add Contact to Group**. From the drop-down list, select <group name> to which you want to add the contact.

Viewing Voicemails from a Contact

1. In the **Quick Dialer Search** bar, type the name or extension number and select the contact.
2. In the third pane, click the drop-down list in the **Search** field and select **Voicemails**.

All voicemails from a selected contact are displayed in the third pane. Click each voicemail entry to reply, forward or delete the voicemail.

Listening to a Voicemail Message

1. On the dashboard, click the **Voicemails** tab.
2. In the second pane, select the voicemail.
3. Click  to play the message through desk phone or  to play through the computer speaker, and click . The computer speaker option is disabled for private voicemail messages.



Note

If you have assigned your Connect client to Softphone, desk phone option will not be displayed.

You can choose to reply, forward, or delete the received voicemail.






Saving a Voicemail Message

1. On the dashboard, click the **Voicemails** tab.
2. On the second pane, click the **All** tab.
3. Right-click the voicemail you want to save, and select **Save Voicemail**.

The save icon  is displayed next to the voicemail name.

To remove the voicemail from the Saved list, right-click the voicemail you want to remove, and select **Unsave Voicemail**.

Replying to a Voicemail Message

1. Access your voicemail messages as described in [Accessing Voicemail Messages](#) on page 61.
2. Click the voicemail that you want to reply to.
3. Click **Reply** and select any of the following icons:
 -  to record the message through the telephone.
 -  to record the message through the computer microphone.
4. Click  to record your message.
5. Click  to stop recording.
6. Click  to play your recorded message.






7. Edit the **To** and **Subject** fields as required. While replying to a private voicemail message, you cannot add more members to the **To** field.
8. Specify any desired options (Urgent, Private, Receipt, and Include Original) for sending the response.
9. Click **Send**.

Forwarding a Voicemail Message



Note


You cannot forward private voicemail messages.

1. Access your voicemail messages as described in [Accessing Voicemail Messages](#) on page 61.
2. Click the voicemail message that you want to forward.
3. Click **Forward** and select any of the following icons:
 -  to record the message through the telephone.
 -  to record the message through the computer microphone.
4. Click  to record your message.
5. Click  to stop recording.
6. Click  to play your recorded message.
7. Edit the **To** and **Subject** fields as required.
8. Specify any desired options (Urgent, Private and Receipt) for sending the message.
9. Click **Send**.

Deleting a Voicemail Message

1. Access your voicemail messages as described in [Accessing Voicemail Messages](#) on page 61.
2. Do one of the following:
 - Right-click the voicemail you want to delete, and select **Delete Voicemail**.
 - Select the voicemail you want to delete and click **Delete**.

Restoring a Deleted Voicemail Message

1. On the dashboard, click the **Voicemails** tab.
2. Click  on the **Deleted Voicemails** header to view the deleted voicemail messages.
3. Select the voicemail you want to restore.
4. Click **Restore**.

Configuring Email Notifications for Voicemail Messages

1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Notifications > Voicemail**.
4. Select the **Send email notification about incoming voicemail to <email address>**.
Your email address configured on the Connect Director is displayed.
5. Do the following to customize the email notification:
 - To receive the voicemail as .wav file format, select the **Attach voicemail as a wave file** option.
 - To mark the voicemail as heard in your voicemail inbox, select the **Mark voicemail as heard** option.

Managing System Notifications for Voicemail Messages

1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Notifications > Popup**.
4. To get a system notification for an incoming voicemail:
 - For Windows, select the **Show a system notification for a voicemail** option.
 - For Mac OS:
 1. Under **Incoming Voicemail**, click **Configure via OS X Notification Center...**
 2. In the Notification Center box, click the Connect Client icon.

3. Click any of the following:

- None
- Banners
- Alerts

Changing your Voicemail Password

1. On the dashboard, click the **<username>** tab.

2. For Mac OS, click **Preferences**.

For Windows, click **Settings**.

3. Click **Voicemail > Setup**.

4. Enter:

- Current password
- New password
- Confirm new password

5. Click **Set New Password**.

Recording Voicemail Greeting Name



1. On the dashboard, click the **<username>** tab.


2. For Mac OS, click **Preferences**.

For Windows, click **Settings**.

3. Click **Voicemail > Setup**.

4. Click the **Record New Name**.

5. Click  to start recording your name, and click  to stop the recording.

6. Click  to listen to the recorded greeting.

7. Do one of the following:

- To save the recording, click **Save Recording**.
- To discard the recorded greeting, click **Discard Recording**, and repeat steps 4 to 7.

Playing Envelope Information for Voicemail

1. On the dashboard, click the **<username>** tab.

2. For Mac OS, click **Preferences**.

For Windows, click **Settings**.

3. Click **Voicemail > Playback**.

4. Select **Play envelope information when listening to messages** to hear the received date and time of the voicemail.

The system will announce the date and time when the voicemail was received in the user's inbox before playing the message.

Routing Calls

Use the following methods to route incoming calls to your predefined external phones:

- Availability Routing—To assign call routing rules based on availability states
- Power Routing—To set customized rules

Availability Routing

Availability Routing allows you to route incoming calls according to your availability state.

You can configure Availability Routing with or without Mobility.

Configure Availability Routing with Mobility

1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Call Routing > Availability Routing**.
4. In the **When** field, click the drop-down list, and select one of the availability states.



Note

By default, incoming calls are routed to your extension and to your Mobility device.

5. Click the **Start Wizard** on the right.
6. To specify your Connect Mobility enabled device, do one of the following:
 - In the blank field, type your 10-digit mobile number.
 - If you do not have a mobility device, then click **My device with ShoreTel Mobility will not have a number associated with it**.

7. Click **Next**.

The Simultaneous Ring page is displayed.



Note

By default, the Simultaneous Ring page displays an extension and a mobility device that are already included for simultaneous ring.

8. To enable an additional device, other than your extension and a mobility device, to ring simultaneously:

- a. Enable the **Also simultaneously ring these numbers** option.
- b. Click the **Select Number** drop-down list.
- c. Select the appropriate option, and click **Use Selected Number**.

9. Click **Next**.

To configure call forwarding, select one of the following options:



Note




If you are not available on any of the devices configured for simultaneous ringing, then you can route the incoming calls either to your voicemail or to any other external number with appropriate permissions.

- Select **Keep ringing the numbers above**.
- Incoming calls will not be forwarded, and only the devices dedicated for simultaneous ringing are permitted to ring.
- If you want to forward incoming calls to your voicemail or to another contact, do the following:
 1. Select **Forward the call to**, and click on the drop-down list, and either select **my voicemail** or type in the contact name or the external number, if you have appropriate permissions.
 2. Click the drop-down list to select the number of rings before forwarding.
 3. In the **if I have more than 16 active calls forward immediately to** field, click the drop-down list, and either select **my voicemail**, or type the contact name or the external number, if you have appropriate permissions.
- Select the **Always forward my calls to** option, and click the drop-down list, and either select **my voicemail** or type the contact name or the external number, if you have appropriate permissions.

10. Click **Next**.

The Voicemail Greeting: Recording & Playback page is displayed.

11. To record the voicemail greeting:

- a. Click  to start recording your message, and click  to stop the recording.
 - b. Click  to listen to the recorded greeting for any incoming voicemail messages.
 - c. Do one of the following:
 1. To save the recorded greeting, click **Save Recording**.
 2. To discard the recorded greeting, click **Discard Recording**.
12. Click **Next**.
- The Interacting with Greeting page is displayed.
13. To enable interaction with the voicemail greeting:
- a. Under **Are callers allowed to leave a voicemail after hearing your greeting?**, select one of the following options:
 - Yes, callers can leave a voicemail.
 - No, callers will not be able to leave a voicemail.
 - b. If you want to forward the incoming call to a particular extension, in the **If callers press '0' while listening to your greeting Forward calls to** field, type a contact name or an extension.
14. Click **Done**.

Configuring Availability Routing without Mobility

1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Call Routing > Availability Routing**.
4. Click the **Start Wizard**.

The Simultaneous Ring page is displayed.



Note

By default, the Simultaneous Ring page displays the device that is already configured for simultaneous ring.

5. To enable simultaneous ring for an additional device, do the following:
 - a. Select the **Also simultaneously ring these numbers** option.
 - b. Click the **Select Number** drop-down list.
 - c. Select the additional number, and click **Use Selected Number**.

6. Click **Next**.
7. To configure call forwarding, select one of the following options:
 - If you do not want to forward incoming calls, select **Keep ringing the number above** so that the devices dedicated for simultaneous ringing are only permitted to ring.
 - If you want to forward incoming calls to your voicemail, do the following:
 1. Select **Forward the call to** and click on the down arrow icon, and select **my voicemail**.
 2. Click the drop-down list to select a number for the rings before forwarding.
 3. In the **if I have more than X active calls forward immediately to** field, click the down arrow icon, and select **my voicemail**.
 - Select the **Always forward my calls to** option, click the drop-down list, and select **my voicemail**.
8. Click **Next**.
9. To enable FindMe, do the following:

**Note**

If the FindMe option is not displayed, contact your Administrator to enable the “Allow external call forwarding and find me destination” option on the Connect Director.

- a. Select **Enabled: Use my FindMe settings to continue routing the call**.
 - b. Select any one of the following options:
 - Select **Ring my FindMe numbers sequentially before playing my voicemail**, and optionally select **Prompt the caller to record their name**.
 - Select **Play my voicemail first. If the caller presses 1 during the greeting then sequentially ring my FindMe numbers**, and check **Prompt the caller to record their name**.
 - c. To define FindMe numbers that will be used sequentially, click the **Select Number** drop-down list, select the appropriate option and click **Use Selected Number**.
 - d. To add another FindMe number, repeat step 8c.
10. Click **Next**.

The Voicemail Greeting: Recording & Playback page is displayed.
 11. To enable voicemail greeting, see [To record the voicemail greeting](#): on page 67.
 12. Click **Next**.

The Interacting with Greeting page is displayed.

13. To enable interacting with the voicemail greeting, see [To enable interaction with the voicemail greeting](#): on page 68.

Configuring Availability Routing Using Custom Settings

1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Call Routing > Availability Routing**.
4. To configure a mobility device for incoming calls, see [To specify your Connect Mobility enabled device, do one of the following](#): on page 66.
5. Click **Change** to configure the following individual options, as required:
 - Simultaneous ringing
 - For more information about configuring simultaneous ring with mobility enabled, see step 8 in [Configure Availability Routing with Mobility](#) on page 66.
 - For more information about configuring simultaneous ring without mobility enabled, see step 5 in [Configuring Availability Routing without Mobility](#) on page 68.
 - Incoming call forwarding
 - For more information about incoming call forwarding with mobility enabled, see step 9 in [Configure Availability Routing with Mobility](#) on page 66.
 - For more information about incoming call forwarding without mobility enabled, see step 7 in [Configuring Availability Routing without Mobility](#) on page 68.
 - Voicemail Greeting: Recording & Playback
For more information, see [To record the voicemail greeting](#): on page 67.
 - Interacting with Greeting
For more information, see [To enable interaction with the voicemail greeting](#): on page 68.

Using Power Routing

Power Routing allows you to create customized personal rules for call routing. You can also edit and delete your power routing rules.

Power Routing overrides Availability Routing.

Creating a Power Routing Rule

1. On the dashboard, click the **<username>** tab.

2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Call Routing > Power Routing**.
4. Click **Create New Power Rule**.
5. In the **Rule Name** field, enter a <name> for the new power rule.
6. In the **When** field, choose a combination of the following conditions to build a custom file for when to forward a call:
 - + number matches
 - + dialed number
 - + my availability
 - + on the phone
 - + time is
7. To add a rule by matching a number:
 - a. Click **+ number matches**.
 - b. Click the **The number is** drop-down list, and select a suitable option. (For a few of these options, you might have to enter an associated number in the corresponding field.)
 - c. To create another rule, repeat steps 7a to 7b.
8. To add a rule based on the known dialed number:
 - a. Click **+ dialed number**.
 - b. Click inside the **Number caller dialed to reach me is** field, and type in the known number.
9. To add a rule based on your availability:
 - a. Click **+ my availability**.
 - b. Select one of the availability states:
 - Available
 - In a Meeting
 - Out of Office
 - Vacation
 - Custom
 - DND
10. To add a rule if you are already on a phone, click **+ on the phone**.
11. To add a rule based on the time or on the day:
 - a. Click **+ time is**.

- b. Select either of the following:
 - If **Time is** selected, enter the **From** and **To** fields for the power rule.
 - If **Day** is selected, select the days for the power rule.
12. Under **Then**, click **Forward call to** and select any of the following options:
 - To forward the call to voicemail, select the **my voicemail** option.
 - To play a ring tone:
 - Click the **my voicemail** drop-down list and select **play ringtone**. An additional Standard Ring option is displayed.
 - Click on the drop-down list and select a ring tone option.
 - To forward the call to specific number, select the **Select Number** option and click in the **Select Number** field and type the desired number.
13. Click **Create Rule**.

Modifying a Power Routing Rule

1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Call Routing > Power Routing**.
4. For the power rule you want to edit, click **Edit**.
5. Edit the steps as required. (For more information, see steps 6 to 12 of [Creating a Power Routing Rule](#) on page 70.)
6. Click **Save Rule**.

Deleting a Power Routing Rule

1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Call Routing > Power Routing**.
4. Click **Delete** for the power rule you want to delete.

Routing Calls to Mobile

You can route all your incoming calls to your Mobility device. You can select or enter the mobile number on which you have installed the Connect Mobility.

To enable this feature, your Connect administrator must configure the Enable Enhanced Mobility with Extension feature in the Connect Director.

Customizing your Call Option Settings

1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Telephony**.
4. Click the **Maximum number of concurrent calls** drop-down list, and select a number in the range configured by your Connect administrator.
5. If you want to suppress call waiting tone, select **Suppress call waiting tone when I'm on a call**.
6. If you want to suppress dial tone, select **Suppress dial tone when I'm off-hook in headset mode on an analog phone**.
7. If you want to close contact card, select **Close contact card after call ends** option to close the contact card soon after you end the call.

CHAPTER

7

Managing Instant Messaging

This chapter provides information about managing instant messaging.

Sending an Instant Message.....	76
Viewing IM Conversation History with a Contact	77
Scheduling a Meeting with a Contact Group	77
Sending a Group Voicemail	78
Managing Instant Messaging Notifications.....	78
Adding Canned IM Responses.....	79

Sending an Instant Message

You can send instant messages to:

- Individuals
- Groups
- Multiple users

Figure 5 describes the various ways to send instant messages to an individual, groups, and multiple users.

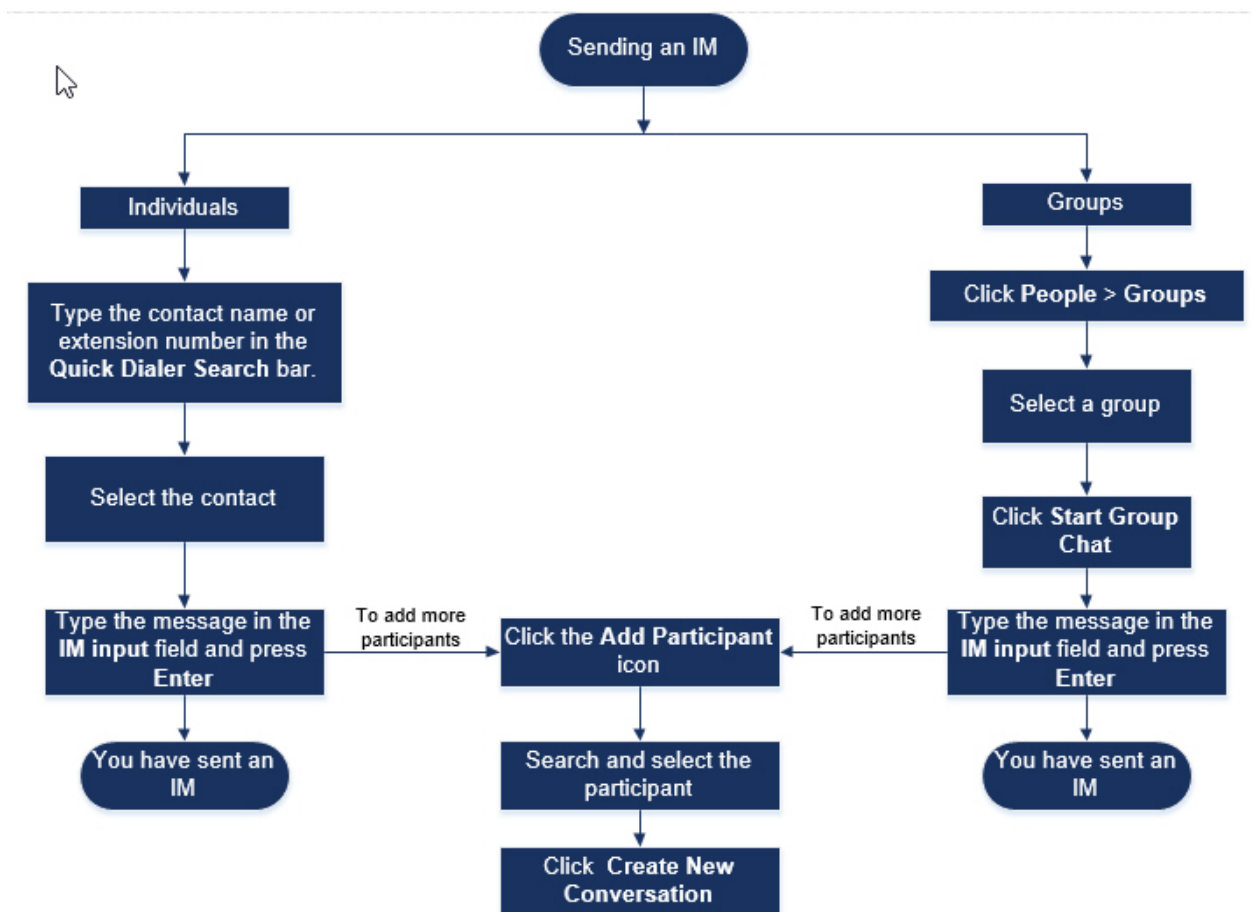




Figure 5: Sending an IM

To send an instant message to an individual or multiple contacts:

1. Find the contact (For more information, see [Managing Contacts](#) on page 24). If the contact is available for instant messaging, you see  (green circle) around the user initials or the availability state icon beside the name in the second pane.
2. In the **IM input** field, type the message, and press **Enter**.

Click the emoticon in the **IM input** field, and select the emoticon to add it to your message. For Windows 7, the emoticons appear in black and white.

3. To add more participants, click  on the third pane.
4. In the **Search** bar on the third pane, type the name or the extension number, and select the contact.
5. Click **Create New Conversation**.

To add more participants, repeat the steps 4 to 5.

To send an instant message to groups:

1. On the dashboard, click **People > Groups**, and select the group.
2. Click **Start Group Chat**.
3. In the **IM input** field, type the message and press **Enter**.

Click the emoticon in the **IM input** field, and select the emoticon to add it to your message. For Windows 7, the emoticons appear in black and white.

You can also add more participants to the group chat after initiating the session.



Note

In a group chat, the messages are delivered only to the contacts who are available online.

Viewing IM Conversation History with a Contact


1. In the **Quick Dialer Search** bar, type the contact name or extension number and select the contact.
2. In the third pane, click the drop-down list in the **Search** field and select **Messages**.


Your IM conversation history with the contact is displayed in the third pane.

Scheduling a Meeting with a Contact Group


1. On the dashboard, click the **People** tab
2. Click the **Groups** tab, and select a group.
3. Click **Schedule Meeting With Group**.
4. Specify the details of the meeting.
5. Click **Create Event Invite**.


Sending a Group Voicemail

1. On the dashboard, click the **People** tab.
2. Click the **Groups** tab, and select a group.
3. Click **Send Group Voicemail**.
4. To record the message through your desk phone's handset, click the phone icon .

To record the message through your computer speaker, click the speaker icon .

5. To start recording the message, click the red circle icon .

To stop recording, click the gray square icon .

To play the recorded message, click the gray arrow icon .

6. Enter the name for your recording in the **Subject** field.
7. Specify any of the following options for the message:
 - Urgent—recipient can see an exclamation (!) mark next to the voicemail.
 - Private—recipient cannot forward a private voicemail.
 - Receipt—sends an acknowledgment to the sender when the recipient has listened to the voicemail.
8. Click **Send**.

Managing Instant Messaging Notifications

To receive a system notification for an instant message:

1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Notifications > Popup**.
4. To enable instant messaging notification:
 - On Windows, select **Show a system notification for an incoming IM** option.
 - Select **Show IM content in the notification** option to see the IM message in the system notification.

- Select **Keep notification on screen for** option, and click the drop-down list and select a number from the list to control the persistence of the IM notification on your system.
- On Mac OS:
 1. Click **Configure via OS X Notification Center...** in **Incoming IM**.
 2. In the Notification Center box, scroll down to select the **Connect client** icon and then click any of the following options:
 - None
 - Banners
 - Alerts
- 5. To disable instant messaging notification:
 - On Windows, disable the **Show a system notification for an incoming IM**.
 - On Mac OS:
 1. Click **Configure via OS X Notification Center...**
 2. Select **Do Not Disturb** on the left notification area.

Adding Canned IM Responses

You can respond with an IM message to an incoming call from another Connect contact.

To add a canned IM response:

1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **IM > Canned IM Responses**.
4. Type your custom canned message, and click **Add Canned Response**.
5. Select the required canned messages from the text box, and click **Delete** to delete the canned message.

CHAPTER

8

Integrating with Microsoft Exchange

This chapter provides information about integrating the Connect client with Microsoft Exchange:

Integrating the Connect Client with Microsoft Exchange.....	82
Synchronizing the Events and the Availability Status with Microsoft Outlook or Office 365 Calendar.....	83
Synchronizing the Connect Client with Microsoft Outlook or Office 365 Contact Folders.....	84
Synchronizing the Connect Client Voicemails with Microsoft Outlook or Office 365	85

Integrating the Connect Client with Microsoft Exchange

You must integrate the Connect client with your Microsoft Exchange to use the following client features:

- Synchronize events and availability status with the Outlook or Office 365 calendar.
- Synchronize your Outlook or Office 365 contact folders with the Connect client for Windows. For Mac OS, the Connect client synchronizes with the Mac Address book. (For more information about synchronizing the Connect client with Mac address book, refer to [Importing the Contact Folders](#) on page 27.)
- Send voicemail notifications to Outlook or Office 365.

To integrate Microsoft Exchange with the Connect client:

1. On the dashboard, click the **<username>** tab.
2. For MAC OS, click **Preferences**.

For Windows, click **Settings**.

3. Click **Account > AD Credentials**.

The **AD credentials** tab does not appear if you have integrated the Connect client with Microsoft Exchange while logging in. For more details about signing in to the Connect client, refer to [Signing in to the Connect Client](#) on page 14.

4. In the **User name** and **Password** fields, enter your Microsoft Exchange (Active Directory) email address and password respectively.
5. Click **Save Credentials**.

If your Exchange server is not configured on the Connect Director, the error message “Your Exchange Server is not set up. Please contact your Connect Administrator” is displayed.

Upon successful credentials validation, the **Unlink ShoreTel Connect from Exchange** option is displayed. To disable integration with Microsoft Exchange, click **Unlink ShoreTel Connect from Exchange**. You must restart the Connect client for the changes to take effect.



Note

If you do not complete the integration with Microsoft Exchange here, the Connect client will prompt you to enter your Microsoft Exchange credentials when you access the Events tab.

Synchronizing the Events and the Availability Status with Microsoft Outlook or Office 365 Calendar

If you have not integrated the Connect client with Microsoft Exchange, you can integrate it from the Events tab.

To integrate the Connect client with Microsoft Exchange from the Events tab:

1. On the dashboard, click the **Events** tab.
2. Enter your Microsoft Exchange credentials in the **User name** and **Password** fields.
3. Click **Submit Exchange Credentials**.

After integrating the Connect client with Microsoft Exchange:

- Your Outlook appointments and Connect client events are displayed on both the Outlook calendar and the Events tab.
- When you create an event on Connect client, a meeting invite with the conference details is displayed in Outlook which can be sent to the participants. For more information about creating an event on Connect client, refer to [Creating a Conference](#) on page 88.



Note

When you install the ShoreTel Add-in Outlook plugin, enabling a delegate to access your Outlook calendar allows the delegate to perform the following options on your calendar:

- Create new Connect conferences
- Edit existing Connect conferences only if the delegate is added as an organizer of the conference.
- Delete Connect conferences

This option is available only on Windows.

You can synchronize the availability state between the Connect client and the Outlook or Office 365 calendar. For example, if you have a meeting currently scheduled on Outlook calendar, your availability state on Connect client changes to “In a meeting”. However, you can also manually change your availability state on the Connect client.

To synchronize your availability state on the Connect client with the Outlook or Office 365 calendar:

1. On the dashboard, click the <username> tab.
2. For MAC OS, click **Preferences**, and click **Contacts/Outlook**.

For Windows, click **Settings**, and click **Outlook**.



Note

For Windows, the “ShoreTelConnectUCBAddIn” add-in should be enabled on your Outlook to complete this synchronization. For more information about enabling Add-ins in Outlook, refer to Microsoft Outlook documentation.

3. Select the **Sync my Exchange calendar with my ShoreTel Connect availability modes** check box.
 - Your availability state on the Connect client changes based on your schedule on the Outlook or Office 365 calendar.
 - The Do Not Disturb, the Vacation, and the Custom availability states always take precedence and do not get affected by this setting.
4. Select the **Use my Outlook Work Hours to switch my ShoreTel Connect availability to Out of Office** option to change your availability state to Out of Office based on your work hours and days specified on your Microsoft Outlook or Office 365 calendar.

You must restart the Connect client for the changes to take effect.

For information about setting the work hours and days on Outlook calendar, refer to Microsoft Outlook documentation.

Synchronizing the Connect Client with Microsoft Outlook or Office 365 Contact Folders

After integrating the Connect client with the Microsoft Exchange, you can import the contact folders from Microsoft Outlook into Connect client to make calls or send instant messages only for Windows.

To import the contact folders from Microsoft Outlook or Office 365 into Connect client (this is applicable only for Windows):



Note

The “ShoreTelConnectContactUploadAddIn” add-in should be enabled on your Outlook to import the contact folders. For more information about enabling Add-ins in Outlook, refer to Microsoft Outlook documentation.

1. On the dashboard, click the <username> tab.
2. Click **Settings** and click **Outlook**.
3. Select the **Sync my Outlook contacts** option.
4. Click **+Show contact folders** and select the folders that you want to synchronize with the Connect client.

You can also import the Outlook contact folders shared by other users into your Connect client. For the shared contact folders to appear in **+Show contact folders**, open the shared invitation email and click **Open this Contacts folder**. For more details about sharing a contact folder in Outlook, refer to Microsoft Outlook documentation.

For Mac OS, you can synchronize the Connect client with the Mac address book. For information about synchronizing the Connect client with Mac address book, refer to [Importing the Contact Folders](#) on page 27.

You can search for contacts from your Microsoft Outlook Public folders, but you cannot import contacts from Public folders to Connect client.

To enable searching for the contact from the Exchange Public Contact folders:

1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences > Contacts/Outlook**.
For Windows, click **Settings > Outlook**.
3. Select the **Enable searching for contacts in my exchange public contact folders** check box.

You can view the contacts from your Exchange Public folders in the Connect client directory.

Synchronizing the Connect Client Voicemails with Microsoft Outlook or Office 365

After integrating the Connect client with Microsoft Exchange, you can synchronize the Connect client voicemails with Microsoft Outlook or Office 365 only for Windows.



Note

The “ShoreTelConnectSTVMAddin” add-in should be enabled on your Outlook to complete this synchronization. For more details about enabling Add-ins in Outlook, refer to Microsoft Outlook documentation.

1. On the dashboard, click the **<username>** tab.
2. Click **Settings**.
3. Click **Voicemail > Outlook**.
4. Select the **Show my voicemails inline in my Outlook inbox** option.

CHAPTER

9

Managing Conferences

This chapter provides information about how to create and manage Connect conferences.

Creating a Conference	88
Creating a Conference from Microsoft Outlook	90
Creating a Reservation-less Conference from My Conference Bridge.....	91
Migrating Reservation-less Conferences from ST Communicator.....	92
Viewing Conferences	92
Downloading the iCalendar Data (ICS) File for a Conference	93
Joining a Conference	93
Joining a Conference from the Notification Area	94
Joining a Conference from the Events Tab	95
Joining a Conference from Your Calendar.....	96
Placing a Participant on Mute	97
Dropping a Participant from Conference.....	97
Recording a Conference	98
Canceling a Conference.....	99
Canceling a Conference from the Connect Client	99
Canceling a Conference from Microsoft Outlook	99
Conferencing using Connect Client for Web	100
Using the Connect Client for Web	100
Using Group Chat.....	101
Using Screen Sharing.....	101
Managing System Notification for Screen Sharing Request.....	103

Creating a Conference

1. On the dashboard, click the **Events** tab.
2. Click **+New Event** at the bottom of the second pane.
3. In the **Name** field, enter a name for the conference. This name is used in email notifications about the conference.
4. In the **Starts** fields, enter the date, and the start time of the conference.
5. In the **Meeting Lasts** field, enter the duration of the meeting in hours and minutes.
6. From the **Occurs** drop-down list, select the recurring frequency of the conference.



Note

You see the **Occurs** field only if you have not integrated the Connect client with Microsoft Exchange on your computer.

7. In the **On Site Location** field, enter the venue for the conference.
8. In the **Meeting type** field, select one of the following:
 - **Collaborative**—Include only the organizers and presenters. You can use this option when you are hosting a conference for a wide list of participants. Everyone is a host and a presenter in this conference type.
 - **Presentation**—Include all of participants along with the organizers and presenters. You can use this option when you are hosting a conference for a limited number of participants.
9. In the **Organizers** field, enter the names of the people hosting the conference.
10. In the **Presenters** field, enter the names of people presenting during the conference.
11. In the **Agenda** field, enter the name of the agenda and the duration of the agenda in minutes.
12. For a conference with a Presentation meeting type, enter the names of the participants in the **Participants** field.
13. In the **Overview** field, enter a brief description of the purpose of the conference.
14. To attach any reference material for the participants, click **Choose from Dropbox** in the Files section. To attach files, you must sign in to Dropbox with your credentials.
15. To configure settings for your conference, click to expand the **+ Show Settings** drop-down list, and then do the following:
 - a. To set a password, select the **Protect Meeting with Password** option, and enter the password in the **Password** field.



Note

The Participant Code and the Organizer Code are automatically generated.

- b. In the **Start the Meeting** section, choose one of the following options:
- When anyone joins
 - When one of the organizers joins
- c. In the **Participants** section:
- To announce the arrival of a participant on the conference call, select the **Announce when participants arrive** option, and select one of the following options:
 - Play a simple audio tone
 - Prompt participants to record their name, and announce when they try to join and leave the meeting
 - To mute all participants joining the conference call, select the **Mute participants on entry** option.
 - To display the names of all participants who have joined the conference, select the **Show everyone's name to all participants** option.
 - In the **When dialing out to participants** area, select one of the following options:
 - Must press one to enter audio portion of the meeting
 - Participants are automatically added to the audio portion of the meeting
16. Click **Create Event Invite** to generate the invite.
17. Depending on your configuration, you see one of the following results:
- If the Connect client is successfully integrated with Microsoft Exchange, you see a **Create Conference Success Opening Outlook Please Wait** message. An email invite draft is opened in Microsoft Outlook, where you can review the content, set reminders and recurrence, and review the list of participants before sending the invite. If you do not see this invite, see Chapter 8, [Integrating with Microsoft Exchange](#) on page 81 for information about integration.
 - If you have not integrated the Connect client with Microsoft Exchange, the new event is created and displayed with the Connect assigned details as described in [Table 4](#) on page 89. When you click **Events** on the dashboard, the conference is listed on the **Upcoming** tab in the second pane.

Table 4: Connect Conference Details

Conference Detail	Description
ID	The meeting ID that is automatically generated by the Connect system when an event is created
Dial-in Info	The conference call dial-in number for host and participants
<Web Conference link for leader/host>	Connect Conference web page link for the host
Participant Code	The access code for participants to join the conference call
<Web Conference link for participants>	Connect Conference web page link for participants

Table 4: Connect Conference Details (Continued)

Conference Detail	Description
Password (optional)	The password to join the secure conference call
Additional Calling Info	The dial-in numbers for different regions. This information is fetched from the Connect Director. To update this information, contact your Connect administrator.

Creating a Conference from Microsoft Outlook

1. Launch Microsoft Outlook.
2. Click **New Items > Meeting**.
3. Click the conference icon at the top right corner of the Outlook ribbon.

A Connect conference is automatically generated with the details listed in [Table 4](#) on page 89 appended to the email invite.
4. In the **To** field, enter the list of participants to invite to the conference. Click **Address Book** or **Check Names** to select or identify directory contacts.
5. To assign participant's role:
 - a. Click **Conference > Settings** to open the conference settings window.
 - b. Un-check **Collaborative meeting - everyone can present** field.
 - c. Click the drop-down next to the participant's name and select the required role.
 - d. Click **OK** to save.
6. In the **Subject** field, enter the purpose of the conference.
7. In the **Location** field, enter the venue of the conference.
8. In the **Start time** fields, enter the date and start time of the conference.
9. In the **End time** fields, enter the date and end time of the conference.
10. Click **Response Options** to configure the responses received from the participants.
11. Select the time slot from the **Reminder** drop-down list to set a reminder.
12. Click **Recurrence** if you want the conference to occur more than once.
13. Click the **Available Outlook** option to configure any other preferences.
14. Click **Send**.

Creating a Reservation-less Conference from My Conference Bridge


You can use My Conference Bridge to start a conference directly from the Connect client without scheduling the conference in advance. This is called a reservation-less conference. You can also invite other users to join these conferences.



Note

- Reservation-less conference details cannot be edited and no date is shown for these conferences.
- Reservation-less conference can be deleted from the Connect Director.

To invite participants to a conference:

1. On the dashboard, click the **<username>** tab.
2. In the second pane, click the **My Conference Bridge** tab.
The conference is named as “My Conference”, and you cannot change this name.
3. Host can join the conference by doing any of the following:
 - a. Click **Join My Event Now**.
 - b. Launch the participant URL provided in My Conference Bridge tab in a web browser.
4. To invite participant to join your conference, do one of the following:
 - Click **Copy To Clipboard** to copy the conference information, and share the information with other users you want to invite.
 - Click **Add Participant** icon and type the participant's name that you want to invite and then click **Conference**.
5. To drop a participant, do one of the following:
 - From dashboard:
 1. Click  icon below the participant name.
 2. In the confirmation dialog box, click **Yes**.
 - From My Conference second pane:
 1. Click **+Info**.
 2. Click on the drop-down next to the participant's name and select **Kick Out of Meeting**.
 3. In the confirmation dialog box, click **Yes**.

Migrating Reservation-less Conferences from ST Communicator

Reservation-less conferences migrate from ST Communicator to the Connect client as follows:

- Users who have a reservation-less conference that was previously configured in ST Communicator and who are unassigned to a service appliance will get an error message when trying to create a new event or if they try to join to an existing conference in the Connect client. To remove these conferences from the Connect client, users should manually delete the old conferences from Outlook Calendar.
- Users who have a reservation-less conference that was previously configured in ST Communicator and who are assigned to a service appliance will have a reservation-less conference created during migration, and the settings defined previously remain valid.

While participant codes on a migrated reservation-less conference remain valid, the **When dialing out to participants** parameter in the event screen is always set to **Must press one to enter audio portion of the meeting** regardless of whether the conference was previously configured with **Participants are automatically added to the audio portion of the meeting**.



Note

- If users have multiple reservation-less conferences configured in ST Communicator, all the reservation-less conferences are migrated.
 - Reservation-less conferences cannot be edited or changed after migration. Ensure that you have the reservation-less conference(s) configured as required prior to migration.
-
- Users who do not have a reservation-less conference previously configured in ST Communicator and who are not assigned to a service appliance will not have a reservation-less conference created during migration.

Accessing Recordings Made with ST Communicator

Prior to migrating from ST Communicator to the Connect client, download any recordings made with ST Communicator and save them to your local system. While the downloaded recordings cannot be played in the Connect client, you can use a Flash player to play them.

Viewing Conferences

1. On the dashboard, click the **Events** tab.
2. Click the **Upcoming** tab to view the list of future conferences.

The list is sorted by date, from the current event to the future events.

3. Click the **Past** tab to view the list of conferences in the past.

The list is sorted by date, from the most recent to the oldest.

**Note**

If you have integrated the Connect client with Microsoft Exchange, you see all your conferences in your Outlook calendar.

Downloading the iCalendar Data (ICS) File for a Conference

The Connect client generates an ICS file for every event if Microsoft Exchange is not deployed. All participants can use this ICS file to populate their calendars with the meeting invite.

To download the Conference iCalendar data file:

1. On the dashboard, click the **Events** tab.
2. Click the **Upcoming** tab to view all upcoming conferences.
3. Select the conference in the second pane to download the ICS file.
4. Click **Download ICS file for External Calendar**.

The **File Save As** dialog box is displayed. The default file name is `shoretel.ics`, and the default path for saving the file is `C:\Users\<user>\AppData\Local\ShoreTel\Meetings`.

5. Enter the file name and select the location or accept the default, and click **Save**.
6. Locate the file on your computer, and double-click to open the iCalendar file.
7. Review all the information about the conference, and save to your calendar.

Joining a Conference

You can join a conference from the Connect client in the following ways:

- **Joining a Conference from the Notification Area:** Use this procedure if you see a notification for the upcoming conference in the notification area on the dashboard. The notification is usually sent 5 minutes prior to a conference.
- **Joining a Conference from the Events Tab:** Use this procedure to join the conference from the Events tab.
- **Joining a Conference from Your Calendar:** Use this procedure to join the conference from your calendar.

Figure 6 describes the different ways to join a conference.

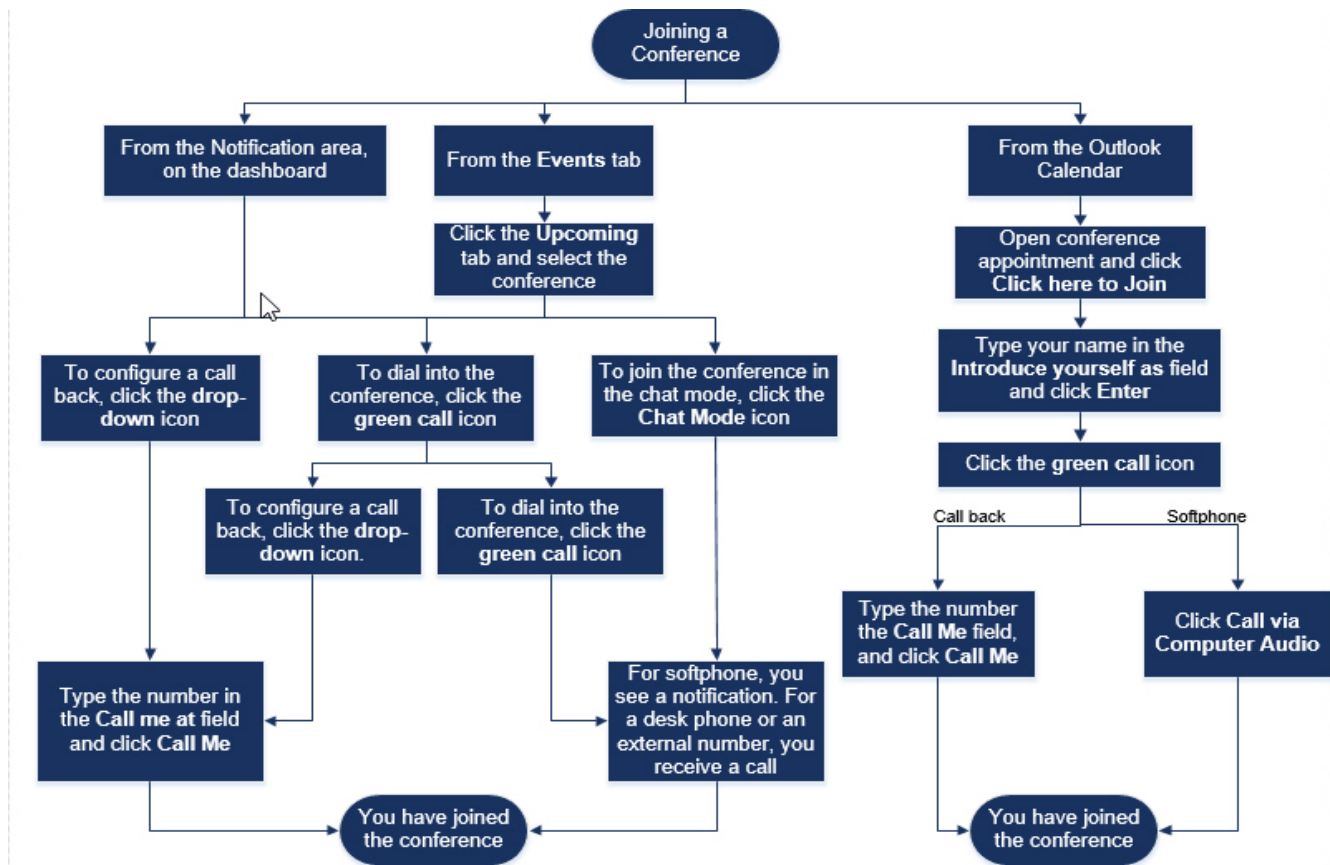





Figure 6: Joining a Conference


Joining a Conference from the Notification Area

When you see an event notification on the dashboard, do one of the following to join:


- To configure a call back:
 - a. Click the drop-down icon in  beside the event name.
 - b. In the **Call me at** field, enter your phone number.
 - c. Click **Call Me**.
- To dial into the conference, click the call icon in  beside the event name.
 - If you have assigned a softphone to the Connect client, you see a notification on the dashboard when you are connected.
 - If you have assigned a desk phone or an external number to the Connect client, the assigned phone rings.

If you are unable to dial into the conference through the assigned phone, see Chapter 5, [Managing Phones](#) on page 39.



- To join the conference in chat mode, click . You can also configure a call back and dial into the conference from the chat mode.

If you have joined the screen share, click  on the task bar at the bottom of the second pane and do one of the following to dial into the conference:

- To join the conference through the assigned phone (softphone or desk phone), click **Call via <assigned phone>**. If you have assigned any external number, click **Call External Assignment**.
- To configure a call back, in the **Call me at** field enter your phone number, and click **Call Me**.


To end the conference, click .

Joining a Conference from the Events Tab

1. On the dashboard, click the **Events** tab.
2. To view all upcoming conferences, click the **Upcoming** tab.
3. Select the conference that you want to join and do one of the following:
 - To configure a call back:
 1. Click the drop-down icon in  beside the event name.
 2. In the **Call me at** field, enter your phone number.
 3. Click **Call Me**.
 - To dial into the conference, click the call icon in  beside the event name.
 - If you have assigned a softphone to the Connect client, you see a notification on the dashboard when you are connected.
 - If you have assigned a desk phone or an external number to the Connect client, the assigned phone rings.

If you are unable to dial into the conference through the assigned phone, see Chapter 5, [Managing Phones](#) on page 39.

- To join the conference in chat mode, click . You can also configure a call back and dial into the conference from the chat mode.

If you have joined the screen share, click  on the task bar at the bottom of the second pane and do one of the following to dial into the conference:

- To join the conference through the assigned phone (softphone or desk phone), click **Call via <assigned phone>**. If you have assigned any external number, click **Call External Assignment**.
- To configure a call back, in the **Call me at** field enter your phone number, and click **Call Me**.


To end the conference, click .

Joining a Conference from Your Calendar

If you have successfully integrated the Connect client with Microsoft Exchange or have downloaded and added the iCalendar data file to your personal calendar, you can join a conference by opening the appointment on your calendar.

1. Open your calendar.
2. Open the conference invitation.

The invitation contains the details of the conference, as described in [Table 4](#) on page 89.






3. Do one of the following:
 - Click the **Click Here to Join** link.
 - Open the URL provided in the conference invitation on a web browser.
4. In the **Introduce yourself as** field, enter your name and press **Enter**.
5. Click  on the task bar at the bottom of the page, and do one of the following:
 - To join the conference through the computer audio, click **Call via Computer Audio**.
 - To configure a call back, in the **Call me at** field enter your phone number, and click **Call Me**.



Note

You can configure a call back only after the organizer joins the conference. If the organizer has not joined the conference, the **Call Me** option is disabled, and you see the message, **Available after an organizer joins** below the **Call Me** field.

6. You can perform the following actions during the conference using the icons on the task bar at the bottom of the page:





- To leave the call during the conference, click .
- To mute and unmute your audio during the call, click .
- To share your screen, a portion of the screen, or an application window, click .
- To view and copy the meeting information, click .
- To ask a question during the conference, click .

7. After the conference ends, close the browser to leave the conference.

Optionally, you can use the dial-in number and the participant code given in the conference invitation to join the conference through your cell phone.

Placing a Participant on Mute

If you are an organizer or a presenter of the conference, you can mute and unmute all participants or an individual participant.

- To mute all participants, click  icon on the conference task bar.
- To unmute all participants, click  icon on the conference task bar.
- To mute a participant, click  icon beside the participant name on the dashboard.
- To unmute a participant, click  icon beside the participant name on the dashboard.




Note


If you enable the **Mute participants on entry** option while creating the conference, the **Mute-all** option is automatically enabled and all the participants will be on mute when they join the conference. For more information about creating a conference, refer to [Creating a Conference](#) on page 88.

Dropping a Participant from Conference

Organizer can drop a participant from the conference. To drop a participant:

1. On the dashboard, click  icon below the participant name.
2. In the confirmation dialog box, click **Yes**.

Recording a Conference

1. Dial in to join a conference.
2. Click  on the conference task bar.
3. Click to start recording the conference.

The **REC** icon turns red to indicate that recording is in progress.

4. When you want to stop recording, click .

You can stop a recording while a conference is in progress. To leave the conference, you must click the red call end icon as explained in [Joining a Conference](#) on page 93.

You can access the recording, and then either download or play the recordings.

To access the recording:

1. On the dashboard, click the **Events** tab.
2. Click the **Past** tab.

A list of conferences appears and  indicates that it is a recording.

3. Select the recording.



Note

You can play the conference recordings on the Connect client and all web browsers except the Microsoft Internet Explorer 11.

Canceling a Conference

You can cancel a Connect conference any time through either the Connect client or Microsoft Outlook.

Canceling a Conference from the Connect Client

1. Click the **Events** tab on the dashboard.
2. Click the **Upcoming** tab to view the list of future conferences.
The list is sorted by date, from the current event to future events.
3. Click the conference that you want to cancel.
4. Click **Cancel Meeting** at the bottom of the third pane.
5. Click **Cancel Meeting** in the confirmation dialog box.

The **Canceling Conference** message is displayed at the bottom of the third pane. This message is followed by **Opening Outlook Please Wait** message, and the Outlook invite is launched (if you have integrated with Microsoft Exchange).

6. Click **Send Cancellation** in the Outlook invite cancellation window to notify participants of the cancellation.

Canceling a Conference from Microsoft Outlook

If you have integrated the Connect client with Microsoft Outlook, you can cancel a conference from the Outlook client.

1. Launch Microsoft Outlook.
2. Open the conference appointment in the Outlook calendar.
3. Click **Cancel Meeting** at the top left corner of the Outlook ribbon.
4. Click **Send Cancellation** to notify participants of the cancellation.

Conferencing using Connect Client for Web

You can use the Connect client for Web to launch Connect conferencing without the Connect client. This feature is useful for remote users who have not installed the client on their systems.

By using the Connect client for Web, you can join a Connect conference from any non-Mitel network without entering any authentication details. Organizers joining the conference through the Connect client for Web can only serve as participants, not presenters or organizers in the meeting.


Using the Connect Client for Web

1. Do one of the following in the meeting invite sent by the conference host:
 - Open the participant URL on a web browser.
 - Click the **Click here to join** link.

2. In the **Introduce yourself as** field, enter your name, and press **Enter**.

The navigation pane on the left displays:






- **Meeting Title**—the conference name
- **Now Sharing**—the contact currently sharing the screen
- **Now Speaking**—the contact currently speaking in the conference
- **Group Chat**—public chat window for all conference participants
- **Attendees**—list of participants in the conference

3. Click  on the task bar at the bottom of the page, and do one of the following:
 - To join the conference through the computer audio, click **Call via Computer Audio**.
 - To configure a call back, enter the number in the **Call Me** field, and click **Call Me**.



Note

You can configure a call back only after the organizer joins the conference. If the organizer has not joined the conference, the **Call Me** option is disabled, and you see the message, **Available after an organizer joins** below the **Call Me** field.

4. You can perform the following actions during the conference using the icons on the task bar at the bottom of the page:
 - To leave the call during the conference, click .
 - To mute and unmute your audio during the call, click .
 - To share your screen, a portion of the screen, or an application window, click .
 - To view and copy the meeting information, click .
 - To ask a question during the conference, click .
5. After the conference ends, close the browser to leave the conference.

Optionally, you can use the dial-in number and the participant code given in the conference invitation to join the conference through your cell phone.

Using Group Chat

Instant messages from other users are indicated with a red pop-up. Click the group chat window or a participant's name to view the message.

To send an instant message to the conference participants:

1. Click the **Group Chat** icon on the left navigation pane.
2. Enter your message in the IM input field at the bottom of the IM chat window, and click **Enter**.

You will receive IM message notifications with a red pop-out. Click the group chat window or participant's name to view the message.

Using Screen Sharing

You can use the screen sharing feature to present your screen to the conference participants. You can share the entire screen, a portion of the screen, or an application window. The area being shared is outlined by a red rectangular border.



Note

If the share icon is grayed out, your configuration might not support screen sharing. For more information, contact your Connect administrator.

Figure 7 describes the various ways to share the screen.

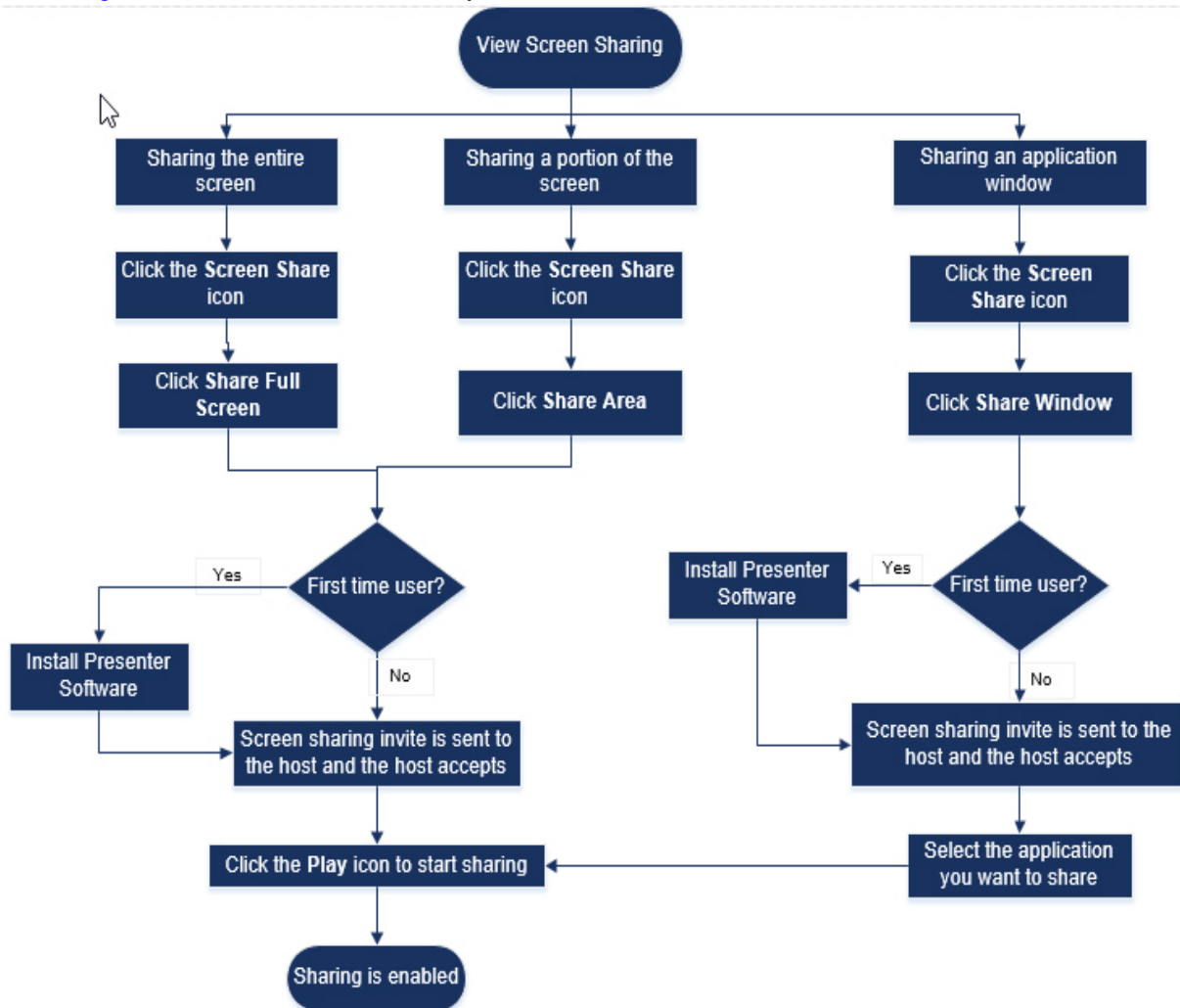



Figure 7: Screen Sharing Methods

To share your screen with the conference participants:

1. On the Conference task bar, click .

2. To share the full screen, select **Share Full Screen**.

To share a portion of the screen, select **Share Area**.

To share an application window, select **Share Window**.

3. If you are a first-time user, select the appropriate option when you are prompted to install the presenter software.

After the software or plugin is installed, screen sharing is enabled.





Note

When you attempt to share the screen in the Microsoft Edge browser for the first-time, the Connect client for Web displays multiple pop-ups to install the Connect Presenter.

4. A screen sharing invite is sent to your host on the Connect client before you start sharing.
5. The Connect client displays a notification on the conference task bar for all screen sharing requests. If you have enabled the system notification for screen share, the Connect client also displays the system notification. Host must click **Accept** on the notification to view your screen, or click **Reject**.

To receive a system notification for screen sharing requests, refer to [Managing System Notification for Screen Sharing Request](#) on page 103.

To share an application window, after the host accepts your screen share invite, select the application you want to share with the participants.

6. Click  at the top of the page to start sharing.
7. Click  at the top of the page to stop sharing.

If another user starts to share the screen while you are sharing, your Connect presenter will exit and stop your screen sharing.

Managing System Notification for Screen Sharing Request



Note

By default, the system notification for screen sharing requests is enabled.

To disable the system notification for an incoming screen sharing request:

1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Notifications > Popup**.
4. Uncheck the **Show a system notification for incoming Screen Share** option.

CHAPTER

10


Sharing on the Connect Client

This chapter provides information about sharing screens and files.

Sharing Screens with a Contact..... 106

Sharing Screens with a Contact

The Connect client enables easy sharing of screens with a contact.

1. Click the **People** tab or enter the contact name/number in the **Quick Dialer Search** bar on the dashboard.
2. Click the contact in the second pane.
3. Click  in the third pane to share your screen.







Note

If you want to call your contact, prior to sharing your screen, see step 7.

4. Do one of the following:
 - Click **Share Full Screen** to share your entire computer screen with your contact. The information displayed on your screen is visible to your contact.
 - Click **Share Area** to share a movable rectangular area that you can use to share specific portions of your screen.
 - Click **Share Window** to share any of the client application windows you have open on your computer. For example, you can choose to share only the Microsoft Outlook Email application window with your contact.

A screen sharing invite is sent to your contact as a notification. During this time, your computer screen is paused for sharing and is marked by a green rectangular border marking the area to be shared.

5. The contact must click  to accept viewing your screen, or click  to reject the screen sharing invite.
6. After your contact accepts your sharing invite, click the play icon  at the top of the screen to start sharing.
7. To call or have a conference with your contact, click the green call icon in the third pane (For information about using this feature, see [Joining a Conference](#) on page 93).
8. To end the screen sharing session, click the close icon  at the top of the screen.

A notification is displayed in your contact's third pane that indicates that you are no longer sharing your screen.

If your contact starts to share the screen while you are sharing, your Connect presenter will exit and stop your screen sharing.

CHAPTER

11

Managing Workgroups

This chapter provides information about managing workgroups using the Connect client.

Workgroups Overview	108
Workgroups Access Types	108
Identify Call by Workgroup Name	108
Managing Workgroups	109
Viewing Workgroups Information	109
Assigning Call Handling Mode Status	109
Filtering Queued Calls	109
Managing Agents	110
Accessing Workgroups Voicemails	111
Configuring Workgroup Notifications	112
Setting Queue Monitor Alert Threshold	113

Workgroups Overview



Note

Workgroup feature is available only for ONSITE users.

Agents and supervisors can see the Workgroups tab on the Connect client dashboard if they belong to any workgroup. The Workgroups tab displays the active workgroup calls for a user, and the current workgroup state.

Table 5. lists the workgroups states of agents and supervisors.

Table 5: Workgroups States of Agents and Supervisors

Color	State	Description
Green	Logged In	Logged into the workgroups
Grey	Logged Out	Logged out of the workgroups
Yellow	Wrap Up	Agent or Supervisor is performing wrap-up work for a workgroup call.

Workgroups Access Types

You must be a member of a workgroup and have necessary license type to view information about workgroups. Your license type determines what type of member you are.

Types of workgroup members are:

- **Agent:** These users have the Workgroup Agent license type and access to workgroup information, but not agent information.
- **Supervisor:** These users have the Workgroup Supervisor or Operator license type and access to all workgroup and agent information. They must also be members of a workgroup.

Identify Call by Workgroup Name

When a supervisor or an agent receives a call for a workgroup, the call notification on the dashboard displays the name of the workgroup. This helps users who are members of multiple workgroups to identify which workgroup is receiving a call.

Managing Workgroups

Viewing Workgroups Information

Click the **Workgroups** tab on the dashboard to view the following workgroup information in the second pane:

- Call Handling Mode icon—Shows the Call Handling Mode status
- Workgroup name—Name of the workgroup
- Queued Calls—Number of calls queued for the workgroup
- Longest Queued—Call that has been on hold for the longest period in the queue
- Longest Call—Call that has the longest call duration

To see the workgroup details, select a workgroup, and click **Show Workgroup Details**. For all the workgroups selected in the second pane, supervisor can view queued calls, agents and voicemail messages in the third pane. You can also select the workgroups by clicking **Settings** option at the bottom of the second pane.

Assigning Call Handling Mode Status

A supervisor can assign the Call Handling Mode status to the workgroup.

To assign the Call Handling Mode status:

1. On the dashboard, click the **Workgroups** tab.
2. In the second pane, click the **Call Handling Mode** icon beside the Workgroup name and select one of the following:
 - On-Hours
 - Off-Hours
 - Holiday
 - Custom

The Workgroup Call Handling Mode status can be customized using the Custom mode. The Custom mode can be configured only from the Connect Director.

Filtering Queued Calls

Select **Queues** tab in the third pane for queued calls details. When you filter the workgroup information by queued calls, you can see name of the caller or telephone number. If caller name is not associated with the call, the following information is displayed:

- Duration that the queued call has been in the workgroup
- Duration of the call in the system

- Dialed number
- Caller ID



Note

To pick calls from the queued calls list, agents and supervisors must select **Allow agents to pickup from queue** option in Connect Director.

Managing Agents

A Supervisor can manage the Workgroup agents from the **Agents** tab on the third pane. The Agents tab is visible only to the supervisors and they can perform all actions without logging in to the Workgroups.

- To search for an agent, select the **Agents** tab on the third pane, and type the agent name or extension number in the **Search** field.
- To change the status of the agents of all Workgroups:
 - a. On the dashboard, click the **Workgroups** tab.
 - b. On the second pane, click **Show Workgroup Details**.
 - c. On the third pane, select the **Agents** tab. By default, in the drop-down list on the left, **All** is selected. If another Workgroup is selected, click the drop-down icon and select **All**.
 - d. Click **Set As**.
 - e. From the drop-down list, select the required status:
 - Logged In
 - Logged Out
 - Wrap-Up (this option is available only when the agents are logged in to the Workgroup)
 - End Wrap-Up
- To change the status of the agents of a single Workgroup:
 - a. On the dashboard, click the **Workgroups** tab.
 - b. On the second pane, click **Show Workgroup Details**.
 - c. On the third pane, select the **Agents** tab. Click the drop-down icon on the left, and select the Workgroup.
 - d. To change the status of all agents in the selected Workgroup, click **Set As** and select the required status.

To change the status of a single agent in the selected Workgroup:

- Click the availability state icon below the agent name and select the required status.

- In the **Search** field, type the name or extension number of the agent, and click **Set As** and select the required status.

If the search result displays more than one agent, using the **Set As** option changes the status of all the agents in the search result.

**Note**

When the Supervisor changes the status of all agents, the status of the Supervisor remains unchanged.

Supervisors can control the following actions for a single agent without logging in to the Workgroup:

- Call an agent
- Check voicemail
- Log in an agent
- Log off an agent
- Put the agent in Wrap Up state (this option is available only when the agent is logged in to the Workgroup)
- Change the Availability state of an agent

With the proper permissions configured by the Connect administrator, supervisors can also perform the following actions on agents:




- Pick up a call
- Unpark call
- Intercom
- Whisper page the agent
- Silent coach the agent
- Barge in on the agent
- Silent monitor the agent
- Setting a Sound Notification
- Enable picking up calls and parking calls

Accessing Workgroups Voicemails

Supervisors and agents can view and listen to the workgroup voicemails without logging into the workgroup.

1. On the dashboard, click the **Workgroups** tab.
2. In the second pane, click **Show Workgroup Details**.
3. In the third pane, click the **Voicemails** tab to view workgroup voicemails.

All the new voicemails are displayed in red.

4. Select a voicemail and click  to play the voicemail through desk phone or  to play through the computer speaker, and click .


By default, the Voicemail tab displays the voicemails of all the workgroups you belong to. You can filter the voicemails list to view voicemails by workgroup.

To view voicemails by workgroup, click the drop-down list on the **Voicemail** tab in the third pane and select the workgroup.



Note

After you exit and reopen the workgroup, the drop-down selection changes to the default value, "All".

The Deleted Voicemails tab is displayed only if there are any deleted voicemails. By default, this tab is in collapsed view. Click  on the **Deleted Voicemails** header to view the deleted voicemails.

To restore a deleted voicemail of the workgroup, locate the voicemail in the Deleted Voicemails list of the workgroup and click **Restore**.

Configuring Workgroup Notifications

To configure the workgroup notifications:

1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Workgroups**.
4. Check **Show me notifications when calls arrive in queue** to view the notifications for the queued calls.

Enter the time duration in **Keep the notification on screen for** field to set the time for displaying the notifications on the screen.

5. Check **Continue to show notification while logged out of workgroups** to view the workgroup notifications after you log out.

Setting Queue Monitor Alert Threshold

To specify the queue monitor alert thresholds and call arrive in queue notification, click **Settings** at the bottom of the second pane. You can also access Workgroup settings by:

1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences**.

For Windows, click **Settings**.

3. Click **Workgroups**.

Supervisor can view all workgroups configured and edit Alert Thresholds for each workgroup. However, agents can view only Alert Thresholds. Closing the preferences window or switching to another tab saves your threshold settings.

When the specified workgroup queue thresholds are exceeded, the queued calls number and/or call duration label color changes to red in the second pane. After the parameter drops below the threshold, the label color changes back to default gray. When the queue threshold exceeds the specified time and number, a sound is played. You can turn the sound on or off using the **Bell** icon at the bottom of the second pane.

To configure Queue Monitor Alert Threshold:

1. On the dashboard, click the **<username>** tab.
2. For Mac OS, click **Preferences**.
For Windows, click **Settings**.
3. Click **Workgroups**.
4. Select the **Enable Workgroup** option for the required workgroup to configure queue monitor alert threshold.
5. In the **Turn ON Threshold Alert** field, select the required workgroup to enable the threshold alert.
6. In the **Alert When Queue Reaches or Exceeds** field, increase or decrease the call queue number for the required workgroup.

This number determines the number of calls that can be queued before sending an alert to the user.

7. If required, in the **Alert When Queued Time Exceeds** field, enter the time duration to set the queue monitor alert threshold for the workgroup.

APPENDIX

A

Operator Features

This chapter provides information on how to enable, and access operator specific features.

Operator Features.....	116
------------------------	-----

Operator Features

Connect Operator license provides the operators with additional features and functionalities within the Connect client that makes easier to manage large volume of calls within the application.

You must have operator license to access operator features and functionalities. Refer *Connect System Administration Guide* to enable operator license for ONSITE and *Support site* for CLOUD.

Connect client provides special features for operators as listed in the [Table 6](#)

Table 6: Operator Features Overview

Features	Description
Drag and drop	Operators can left-click and drag an object in both the directions; from call stack to a contact and vice versa.
Drag and hover	Operators can left-click and hover an object in both the directions; from call stack to a contact and vice versa to access more telephony functions. The advanced telephony functions are: <ul style="list-style-type: none"> ■ Blind Transfer ■ Consultative Transfer ■ Intercom Transfer ■ Transfer to Mailbox ■ Park ■ Park and Page ■ Park and Intercom ■ Blind Conference ■ Consultative Conference ■ Intercom Conference For more information, refer to Transferring a Call on page 50.
Call stack orientation	Operators can view the oldest call at the top of the call stack and the most recent call at the bottom.
Double click to answer	To answer an incoming call, operators can: <ul style="list-style-type: none"> ■ Double-click anywhere in the incoming call notification area. ■ Click the green call icon as other users.

Table 6: Operator Features Overview

Features	Description
Routing slip	<p>Operators can view or hide the routing slip for each call by toggling the routing slip icon in the incoming call notification area.</p> <p>Note: Routing slip is disabled by default.</p> <p>To enable routing slip, refer to Managing Call Notes and Viewing Routing Slips on page 57.</p>
Changing availability state of a contact	<p>Operators can change a contact's availability state if:</p> <ul style="list-style-type: none"> ■ Contact belongs to the contact group created by operator. ■ Contact has added operator on his access list. To add a contact to access list, refer Allowing a Contact to Manage your Availability State on page 37. <p>To change a contact's availability state, do one of the following:</p> <ul style="list-style-type: none"> ■ Right-click a contact, and select Change Availability <availability state>. ■ Open the contact card by selecting a contact, click on the arrow next to contact's availability state, and select the state.
Identifying the call by workgroup name	<p>When an operator receives a call for a workgroup, the call notification on the dashboard displays the name of the workgroup. This helps users who are members of multiple workgroups to identify which workgroup is receiving a call.</p>

