



Communicator for Mac Help

[About the ShoreTel Communicator](#)

Introduction to the ShoreTel Communicator for Mac

[ShoreTel Communicator elements](#)

Learn about the window layout, panels, icons, buttons and notifications

[Managing Calls](#)

Learn basic management of incoming and outgoing calls

[Communicating your status](#)

Learn how to configure and use the Call Handling Mode

[Reaching you remotely](#)

Use Find Me, Extension Assignment and Additional Phones to reach you when you are away from your desk

[Customizing ShoreTel Communicator](#)

Change the look and feel of the ShoreTel Communicator

[Changing Users](#)

Logging in as someone else

[Dialing your Contacts](#)

Using Services to make a phone call, Address Book integration

[Customer Support Information](#)

Access logging and tracing information for troubleshooting and technical support

About the ShoreTel Communicator

The ShoreTel Communicator for Mac is a powerful unified communications application that provides access to the ShoreTel system. It provides similar functionality as the ShoreTel Communicator for Web, which provides features available in the Personal Access level.

ShoreTel Communicator for Mac will be beneficial to users based on the following situations:

Users that need to run ShoreTel Communicator on an Apple Macintosh computer.

Users that occasionally work from home on an Apple Macintosh computer and do not need soft phone or video.

ShoreTel Communicator for Mac provides options for controlling the following features:

- Visual Call Control
- Visual Voicemail
- Call handling mode
- Call handling mode settings
- Voice mail notification delivery settings
- Find Me settings
- External Assignment settings
- Passwords for ShoreTel Communicator and voice mail

For specific details on the use of these features, please review the **ShoreTel Communicator for Web User Guide**.

The ShoreTel Communicator provides the following Mac specific features:

- Dial contacts directly from Mac Address Book
- Import contacts from Mac Address Book to the ShoreTel server so that personal contacts can be accessible from the user's other instances of Communicator
- Allows dialing from many applications using Mac OS X services
- Can be kept in Dock and opened at startup like any Mac application.
- Dock icon displays a Badge with missed call and unheard voicemail counts
- Background notifications of incoming calls and voicemails
- Growl support for incoming call notification

The ShoreTel Communicator for Mac does not provide the following features:

- Instant Messaging
- Video
- Softphone
- Contacts Viewer
- Additional features provided in the ShoreTel Communicator Professional access level
- Additional features provided in the ShoreTel Communicator Workgroup Agent and Workgroup Supervisor access levels
- Additional features provided in the ShoreTel Communicator Operator Communicator access level

[Back to Main Menu](#)

ShoreTel Communicator Elements

The ShoreTel Communicator for Mac Main window is the primary window for accessing client services. You manage your phone calls and status at the top of the window and you access information about your voicemail, call history and call details at the bottom of the window.

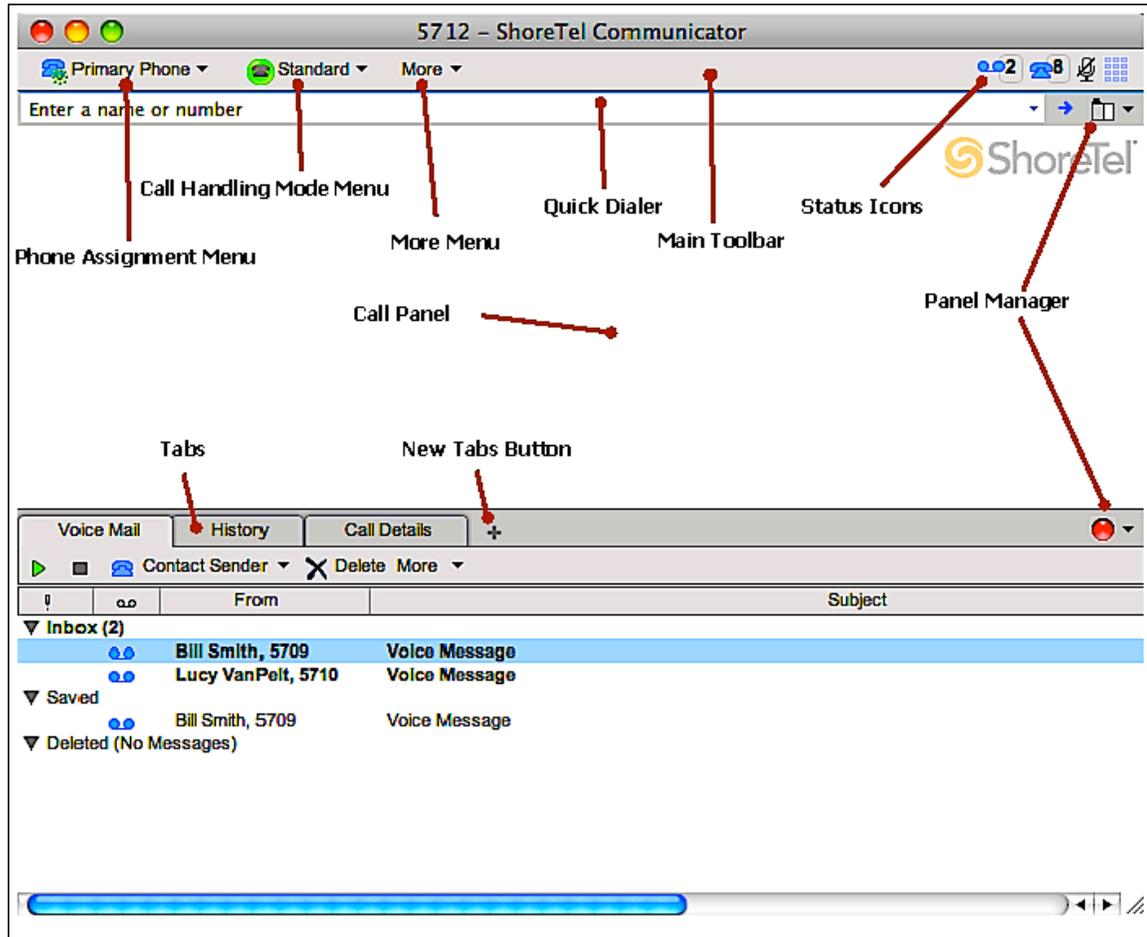


Figure 1 ShoreTel Communicator for Mac - Main Screen

Screen Options	Screen Descriptions
Main Toolbar	This toolbar provides single button and menu access to ShoreTel Communicator tasks.
Call Handling Mode Menu	This menu lets you set and configure the call handling mode for your phone.

Screen Options	Screen Descriptions
Phone Assignment Menu	This menu allows you to choose to have calls to your extension ring on your Primary Phone (e.g. your desk phone) or on an external phone (e.g. your mobile phone). With this menu, you can simply select the device or open the configuration edit panel to configure additional external numbers.
More Menu	This menu allows you to set the Default Auto Off-Hook parameters and enable/disable the Additional Phones parameters. It also allows you to pickup the Night Bell, send an overhead page and access program preferences and help.
Quick Dialer	The QuickDialer allows you to enter a name or phone number to make a phone call. It also provides drop-down access to directory names and phone numbers. The list of names that you see is filtered by the text you enter in the Quick Dialer text area. You can also enter, paste, or drag numbers into the QuickDialer field.
Status Icons	Status Icons provide a visual indication of the voicemail and phone states. Here you can see if you have a voice mail message or have missed a phone call.
Call Panel	The Call Panel displays incoming and outgoing calls in progress. Each call will be displayed on a single line in this panel.
New Tab Button	This button allows you to add panels to the viewing area. You can add the Voice Mail, Call History, Call Details panels with this button.
Panel Manager	The Panel Manager allows you to change the way you arrange the panels in the Communicator. The Panel Manager allows you to create split screen views.

Table 1 ShoreTel Communicator for Mac - Main Screen

Status Bar Icons

Status Bar icons provide a visual indication of the voicemail and phone states. It also shows you if there is any trouble (errors) with your phone.

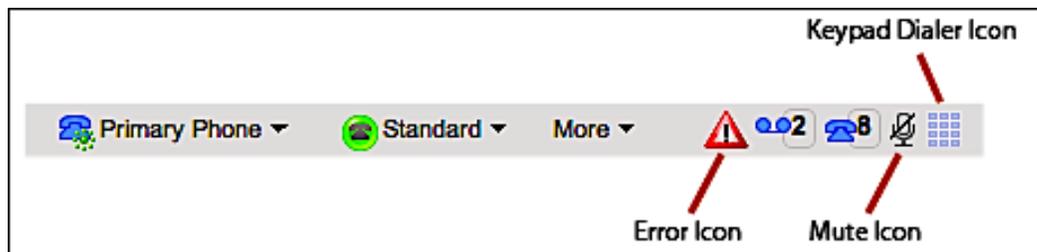


Figure 2 Status Bar Icons

Keypad Dialer

The Keypad Dialer allows you to enter digits during an external phone call. External phone calls are calls that are sent to or received from outside of your ShoreTel phone system. For example, you can use the Keypad Dialer to enter your account number when calling your bank.

The Keypad Dialer is not available for calls sent to or received from another ShoreTel extension. During an external call, the Keypad Dialer icon becomes dark blue and you must click on the icon to display the Keypad Dialer.

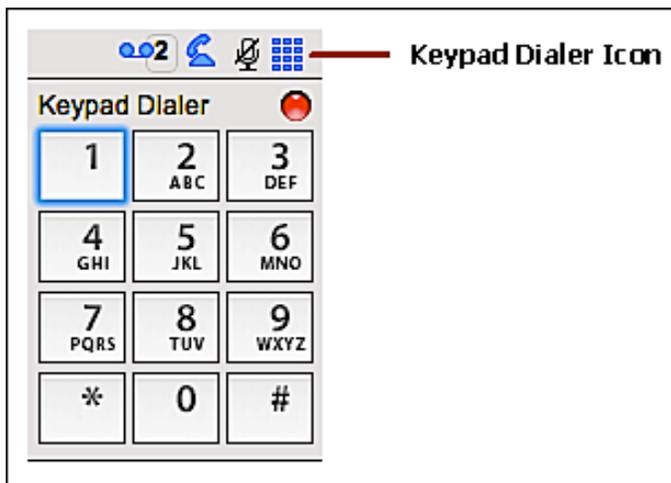


Figure 3 Keypad Dialer

Notifications

The ShoreTel Communicator generates notifications when new calls or voicemails are received. Notifications are enabled by installing Growl. Growl is a freeware public domain product used to enable notification features in Mac OS X applications.

The Growl installer is bundled with ShoreTel Communicator for Mac. If Growl is not previously installed, when a user receives their first call, the Growl installation panel is displayed.

This dialog box requests the user's permission to install Growl on the client machine. Clicking the Install button will start the installation process and display the preferences pane.

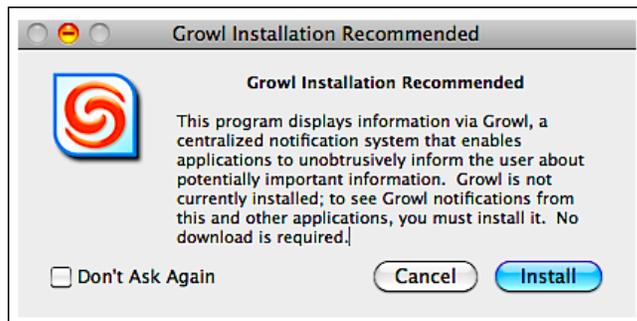


Figure 4 Growl Installation Recommended

Note: The Growl install message language is localized by the growl development team and not by ShoreTel. Not all languages supported in Communicator for Mac are supported in Growl. Therefore, the growl install message will only show in Russian, Swedish, Japanese, German, French, Dutch, Brazilian Portuguese or English.

English is the default notification language if another language translation is not found. Only the Growl install message is affected, all other notifications will appear in the language supported by Communicator for Mac.

After installation, notifications are displayed anytime a call or voicemail is received.

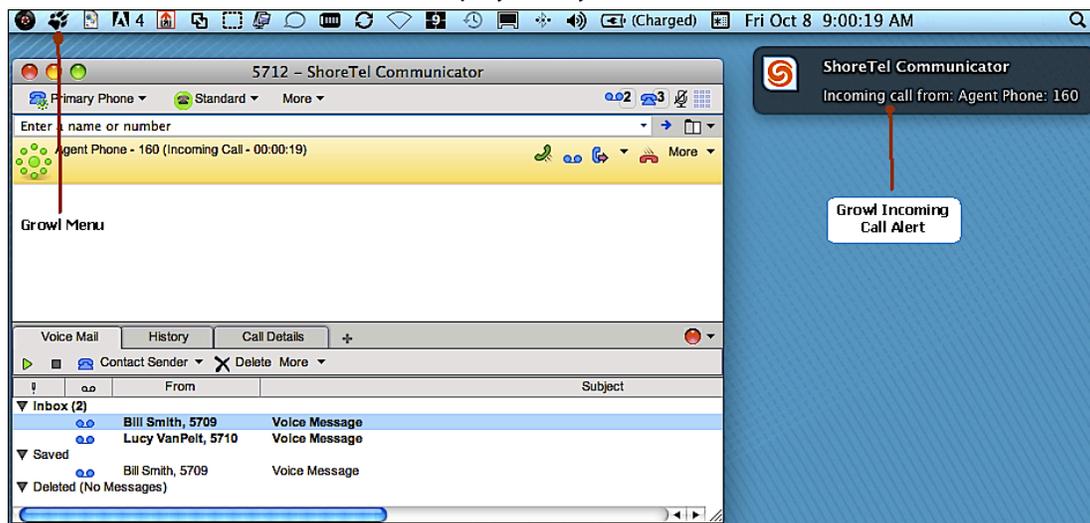


Figure 5 Growl Incoming Call Alert

Dock Icon and Badge

As with other Mac applications, ShoreTel Communicator for Mac can be present on the Dock for easy access and launch of the Communicator application. The user has control over the application display and launch properties on the Dock.

When a user has missed calls or has unheard voicemails, the ShoreTel icon will display a badge with a number for each. The first number displayed is the number of unheard voicemails (3) and the second is the number of missed calls (2). If there are none of either, the badge will not appear on the icon.



Figure 6 Dock Controls, Icon with Badge

[Back to Main Menu](#)

Managing Calls

Answering a Call

When a call is presented to your extension, you will see an indication of the incoming call. Pick up the telephone or click on the answer icon to answer the call.



Figure 7 Incoming Call – Call Cell

Call In Progress

When a call has been answered the user has several options available including placing the call on hold, transferring the call, conferencing in another caller or ending the call by clicking the hang up icon.



Figure 8 Call In Progress – Call Cell

Transferring a Call – Blind Transfer

Once a call is in progress, you can transfer a call by pressing on the **Transfer** icon. The following steps show you how to transfer a call:

1. Click on the Transfer icon
2. Enter a name or number.
3. If there are multiple matches in the pull-down list, click on one of the names to transfer the call. Otherwise press the Return key to transfer the call.

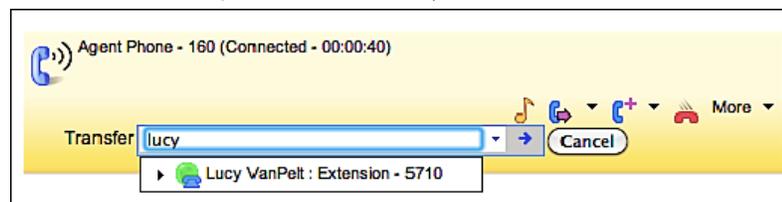


Figure 9 Call Transfer – Enter Name

Transferring a Call – Consultative

You can speak with desired person before transferring the call to them. In this case, you will use the pull-down menu to start the transfer. The following steps show you how to perform a consultative transfer:

1. Click on the pull-down arrow to the right of the **Transfer** icon
2. Select **Consult**.

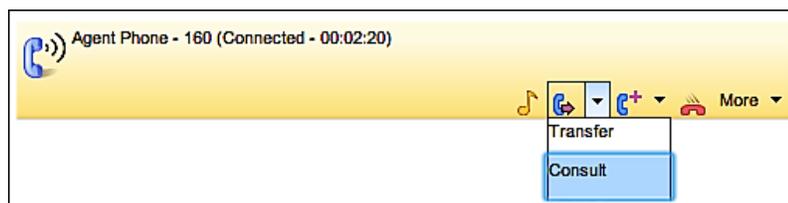


Figure 10 Consultative Call Transfer – Menu

3. In the Consult field, enter a name or number. If there are matches in the pull-down list, click on one of the names to start the consultative transfer.

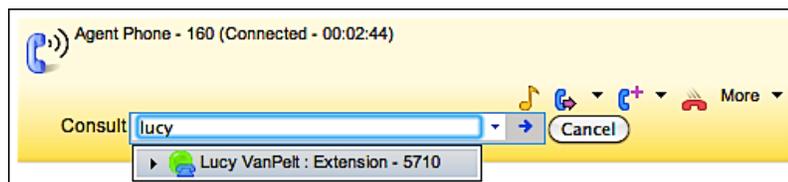


Figure 11 Consultative Call Transfer – Enter Name

4. Once your called party picks up the phone, the call cell will change to display the following:

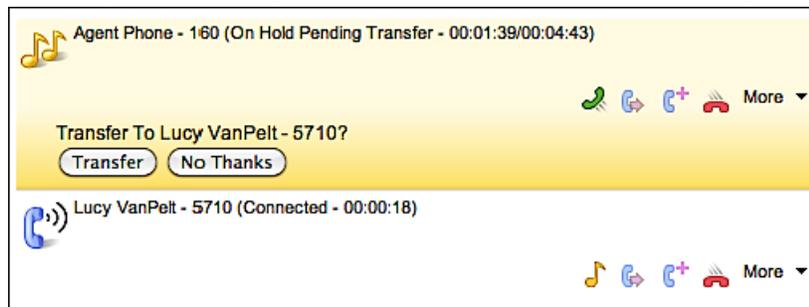


Figure 12 Consultative Call Transfer – Confirm

5. Chose the **Transfer** button to transfer the call or the **No Thanks** button to pull the call back, hang up on the person you were consulting and return to your original caller.

Note: The original caller is placed on hold during the consult and cannot hear your consultative conversation.

Making a Conferencing Call – Consultative

You can speak with desired person before conferencing them in. In this case, you will use the pull-down menu to start the conference. The following steps show you how to perform a consultative transfer:

1. Click on the pull-down arrow to the right of the **Conference** icon
2. Select **Consult**.

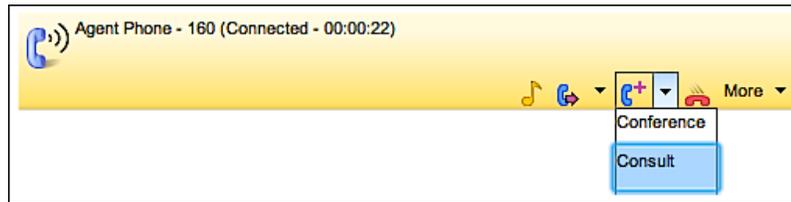


Figure 13 Consultative Conference Call – Menu

3. In the Consult field, enter a name or number. If there are matches in the pull-down list, click on one of the names to start the consultative transfer.

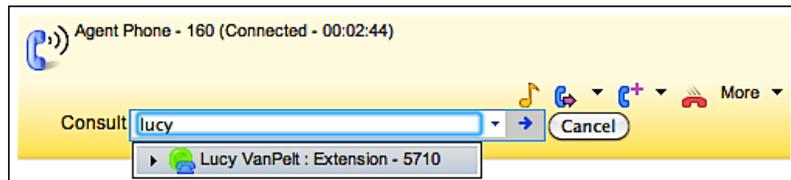


Figure 14 Consultative Conference Call – Enter Name

4. Once your called party picks up the phone, the call cell will change to display the following:

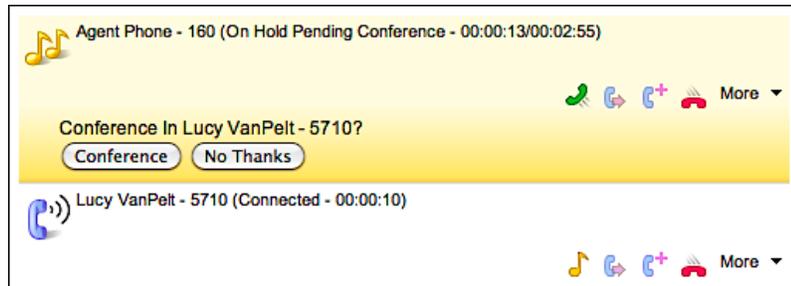


Figure 15 Consultative Conference Call – Confirm

5. Chose the **Conference** button to conference in your party or the **No Thanks** button to pull the call back, hang up on the person you were consulting and return to your original caller.

Note that the original caller is placed on hold during the consult and cannot hear your consultative conversation.

Note: It is best practice to consult someone before adding him or her into the conference call. If you desire to immediately place a person in a conference call, select the **Conference** menu selection instead of the **Consult** menu selection.

[Back to Main Menu](#)

Quick Dialer

The QuickDialer allows you to quickly reach other people by entering their telephone number or selecting their name or number from a list.

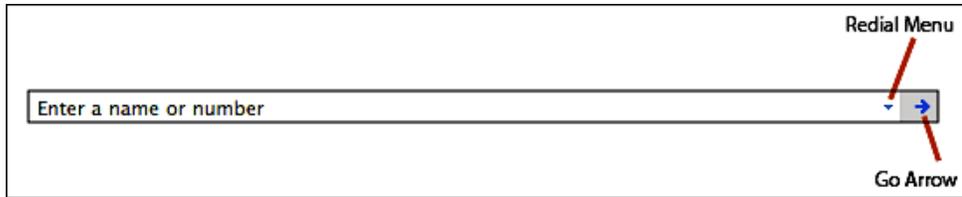


Figure 16 Quick Dialer Field

Entering a name

The Quick Dialer provides a drop-down menu to access to directory names and phone numbers that match the text you enter in the data entry field. Type a name or phone number and the press **Return** key to make a phone call. Alternatively, you can press the **Go Arrow**, instead of pressing the **Return** key, if you type in a phone number. If there is more than one match to the name you have entered, you must click on the desired phone number to make the phone call.

In the figure below, the caller is trying to reach Lucy VanPelt. Click on the extension to call her number or click on her email to open your mail client and send her an email.

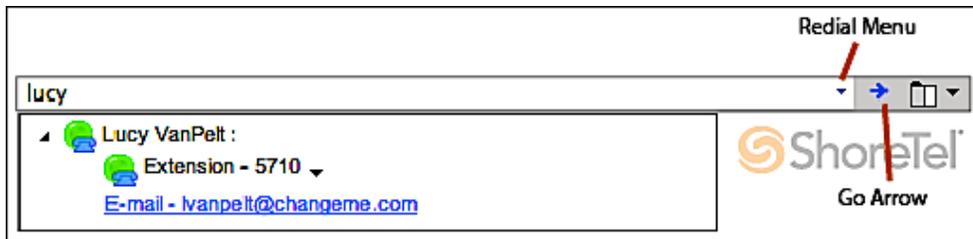


Figure 17 Quick Dialer Field – Entering a name

Redial Pull-down menu

At the right side of the QuickDialer field you will find the Redial Menu, which gives you access to your call history. The pull-down shows directory names and phone numbers of your recent calls. The amount of information shown can be configured in the **Quick Dialer** section of the **Options and Preferences** window.

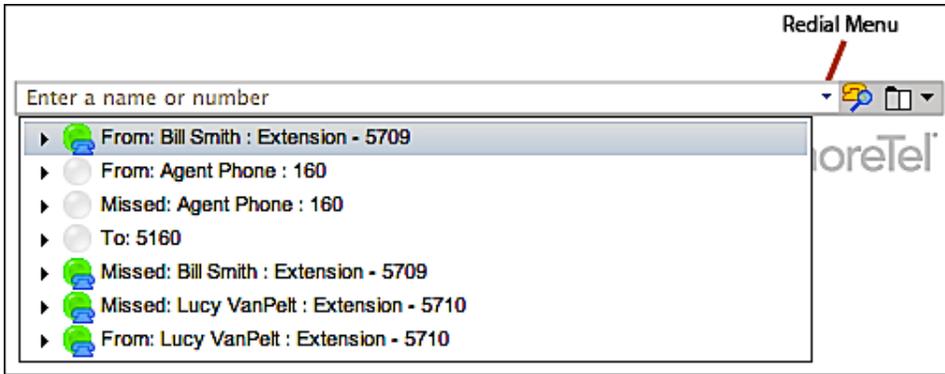


Figure 18 Quick Dialer – Redial Menu

More Menu

The More Menu provides you with more options for managing a call in progress. The More Menu changes dynamically depending on the current state of the call. The following is the More Menu display after you have answered a call:

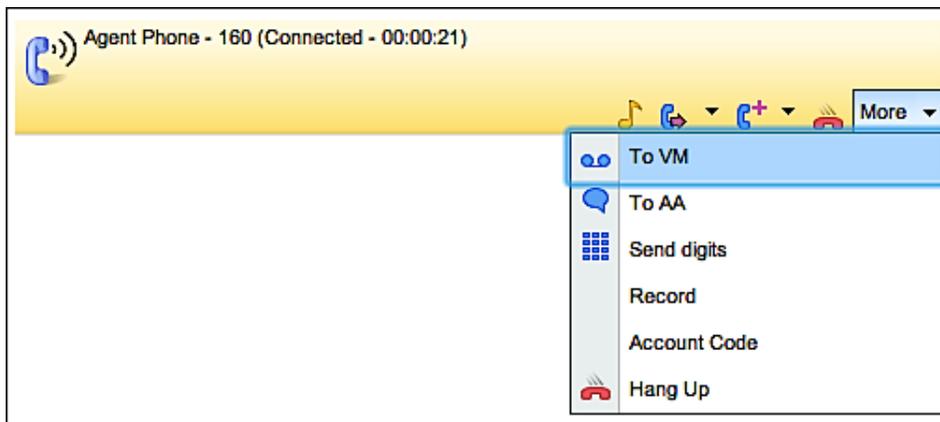


Figure 19 More Menu

[Back to Main Menu](#)

Communicating Your Status

Call Handling Modes

A Call Handling Mode defines how your inbound calls are managed. Many people want to do two things when they are away from their desk: 1) play a different greeting and 2) send incoming calls to another phone number while they are away. Call Handling Modes allow you to do this.

The ShoreTel system defines the following five Call Handling Modes to customize the manner that your calls are handled over a variety of situations. The following table gives you common examples of how people use Call Handling Modes.

Call Handling Mode	Call Handling Mode Typical Usage
Standard	This is the default Call Handling Mode where the phone rings 3 times and then forwards to voicemail.
In a Meeting	This mode is typically used when you are in a meeting and you would like to play a different greeting. You may also want to change where the phone rings while you are away.
Out of Office	This mode is typically used when you are in a out of the office and you would like to play a different greeting. You may also want to change where the phone rings while you are away.
Extended Absence	This mode is typically used when you are away from the office for an extended period and you would like to play a different greeting. You may also want to change where the phone rings while you are away.
Custom	This mode is typically used when you are away from your desk and you would like to play a different greeting than the recorded message played in one of the other 4 call handling modes. You may also want to change where the phone rings while you are away.

Table 2 Call Handling Modes

To change the Call Handling Mode, simply select the desired mode from the pull-down menu and the system will automatically play your new greeting and manage calls in the way that you have configured.

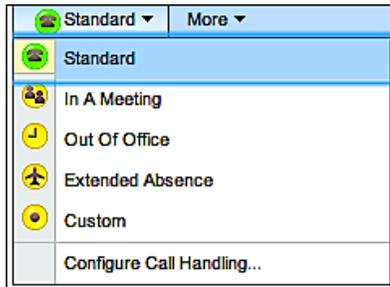


Figure 20 Call Handling Mode Menu

To configure your Call Handling Mode, select **Configure Call Handling...** from the Call Handling mode pull-down menu. This will open up the **Options and Preference** window and select the **Call Handling Mode** pane. Select your desired Call Handling Mode and configure your desired options.

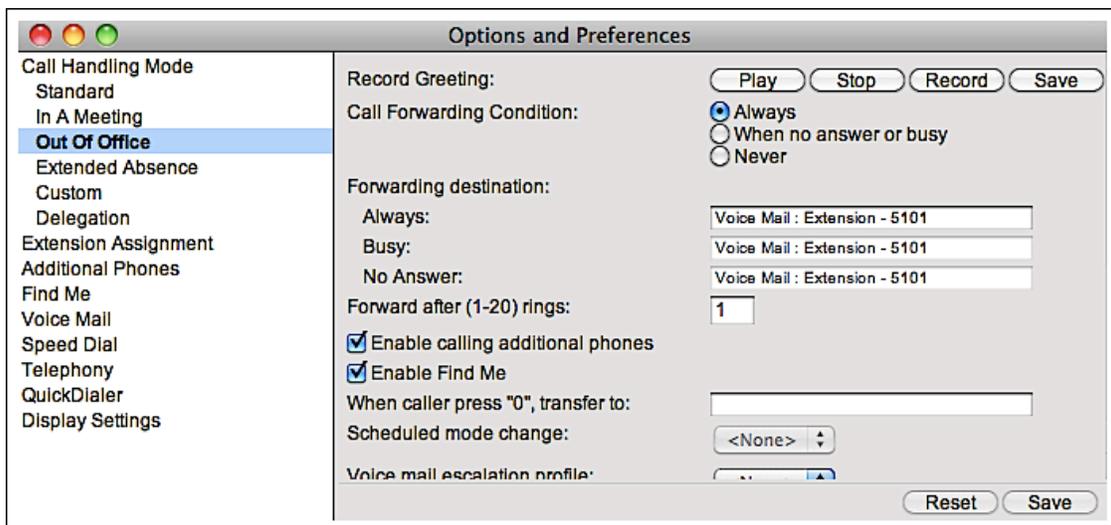


Figure 21 Configuring the Call Handling Mode

Configure your greeting by pressing the **Record** button and recording your message on your telephone. Press **Stop** when you finish speaking. Press **Save** to save your greeting. You can do this for each of the five Call Handling Modes.

Review the next section, **Reaching You Remotely**, for guidelines on how to use the Call Handling Mode to send your phone calls to your mobile device or to another extension while you are away from your desk.

Consult the **ShoreTel System Administration Guide** for more information on configuring the Call Handling Modes.

[Back to Main Menu](#)

Reaching You Remotely

When you are away from your desk, you may wish to have phone calls to your extension reach you on your mobile device or forward to another telephone. There are many ways to do this in the ShoreTel Unified Communications system.

Here we explore 3 different ways to reach you while you are out of the office. Two of the methods use Call Handling Modes and one method simply redirects all of your incoming calls to a phone number that you specify.

Find Me

The Find Me feature allows callers, that are listening to your voicemail message, to press “1” and request the ShoreTel system to dial up to two alternate numbers that you specify. If the ShoreTel system cannot reach you at one of these two numbers, the caller can leave you a voicemail message in your ShoreTel voice mailbox.

Configuring Find Me

To configure the Find Me feature, you must use the **Options and Preferences** Window. To open this window, select **Preference** from the **More** menu.

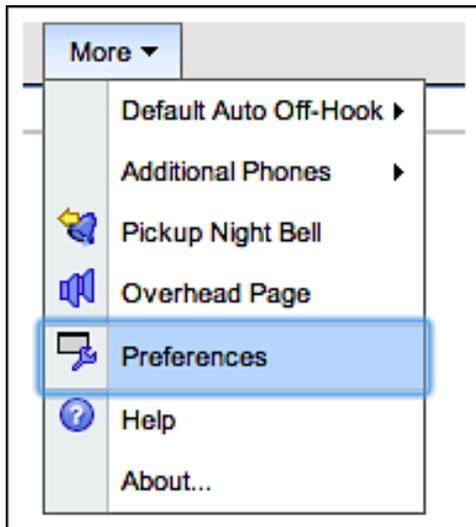


Figure 22 Opening the Options and Preferences Window

Select the **Find Me** option to open the configuration page for the Find Me feature. In this panel, you enter up to two numbers that the ShoreTel system will use to reach you. These numbers can be internal extensions or external phone numbers. Press **Save** to save your changes.

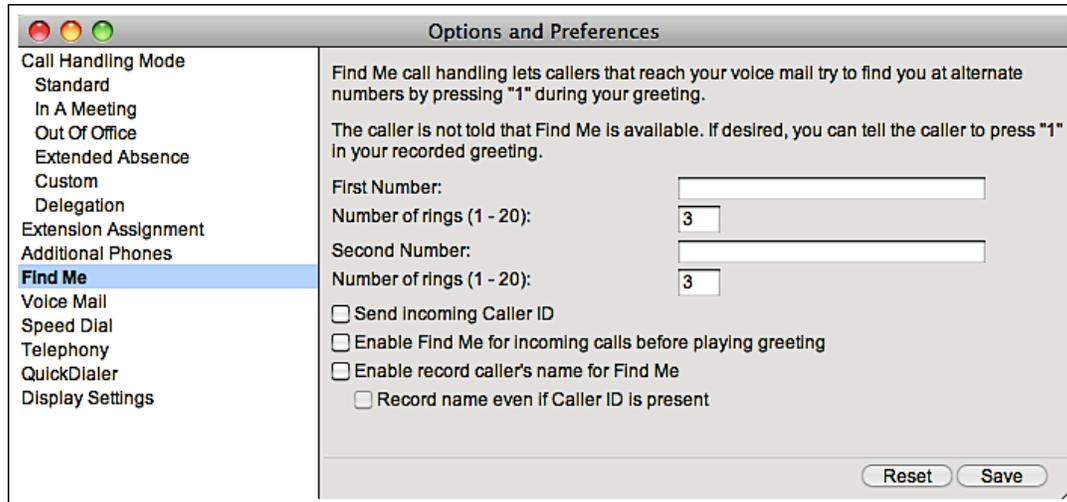


Figure 23 Configuring Find Me

The Find Me feature is enabled by default on all of your call handling modes. If you would like to disable Find Me for any of the Call Handling modes, navigate to your desired Handling Mode and uncheck the **Enable Find Me** checkbox.

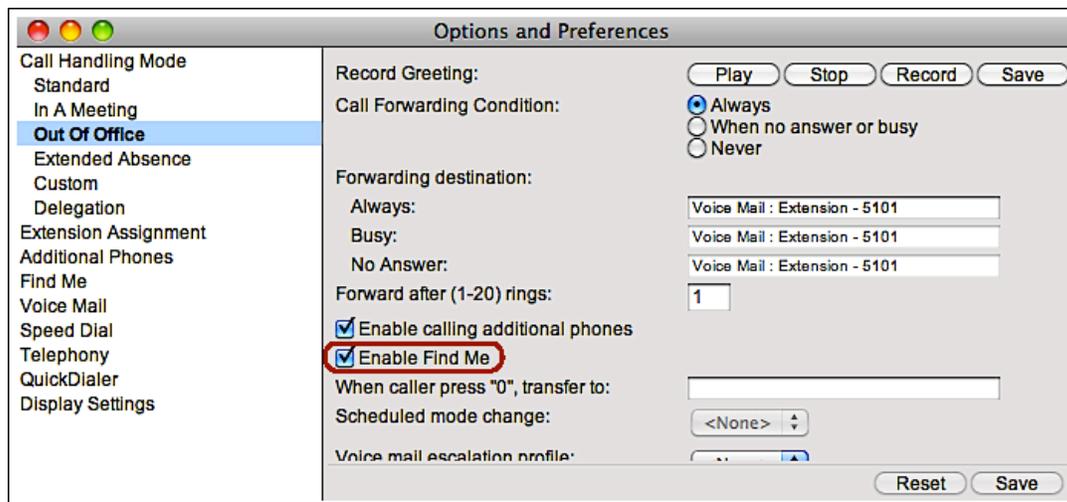


Figure 24 Enabling Find Me in a Call Handling Mode

More information

Consult the **ShoreTel System Administration Guide** for more information on the Find Me feature.

[Back to Main Menu](#)

External Assignment

The External Assignment feature allows you to redirect incoming phone calls for your extension to an external number. When using this feature, you still retain call control via ShoreTel Communicator. This means that, if you are remotely connected to your office via a Virtual Private network (VPN), you could still manage your phone calls with ShoreTel Communicator for Mac while you receive your extension calls on any external phone. For example, you could have calls to your extension ring on your mobile phone or your home office phone. This would be a common Remote Office Worker configuration.

Configuring External Assignment

To configure this feature, select **Configure Extension Assignment** from the Phone Assignment menu. This will open the **Options and Preferences** window and select the **Extension Assignment** option.

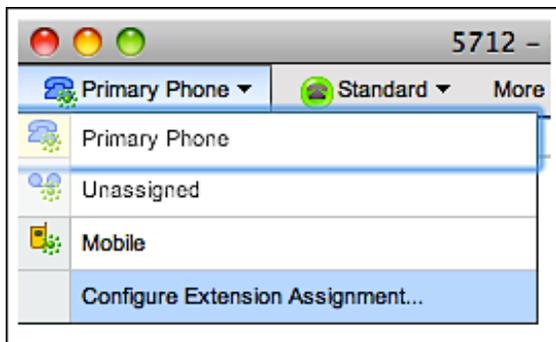


Figure 25 Opening the External Assignment configuration panel

Then configure your external number by entering a **Label** and **External Number** and pressing **Add**. Press the **Save** button to save your changes.

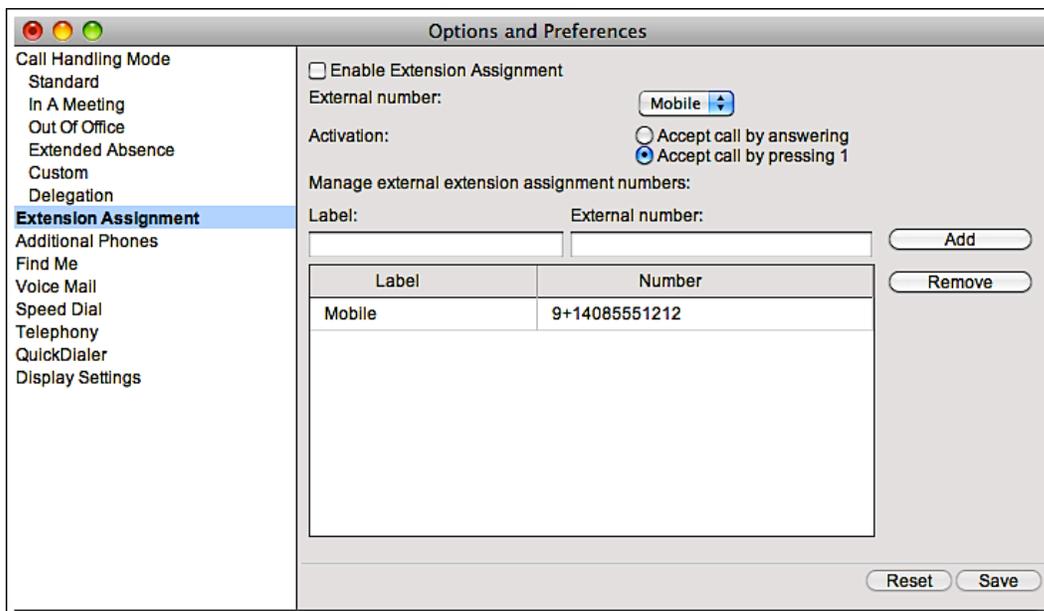


Figure 26 Configuring External Assignment

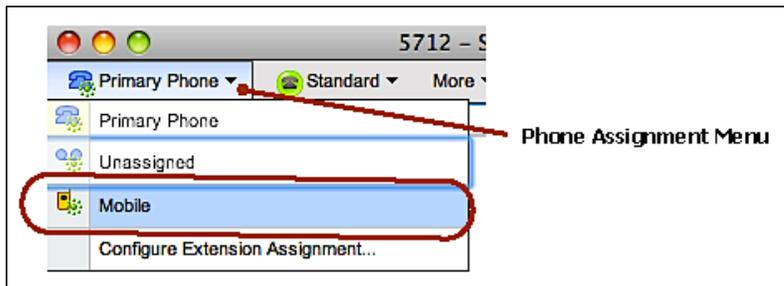


Figure 27 Selecting an External Assignment

To use one of your configured External Assignments, simply select it from **Phone Assignment** pull-down menu. In Figure 27, the user is selecting the **Mobile** external assignment for extension 5712.

More information

Consult the **ShoreTel System Administration Guide** for more information on the External Assignment feature.

[Back to Main Menu](#)

Additional Phones

The Additional Phones feature allows you configure the ShoreTel Unified Communications system to ring multiple devices when someone calls your extension or your DID number. When you answer the phone on one of the devices, you will be connected to the caller and the other devices will stop ringing.

Configuring Additional Phones

To set which phones will ring, open the **Options and Preferences** window by selecting **Preferences** from the **More** menu.

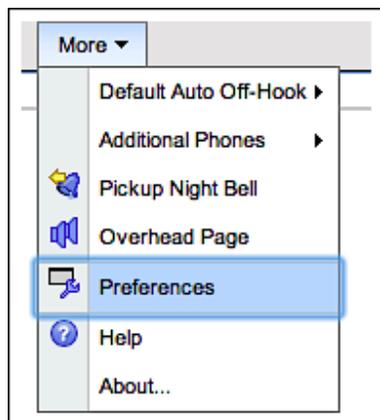


Figure 28 Opening the Preferences panel

Enter up to two numbers to ring simultaneously with the phone on your desk. Enter internal phone numbers in the **First Phone** and **Second Phone** fields or enter an external number by using the **Label** and **External number**: fields. When entering an external number, you must press **Add** to add the external number to the list prior to saving your changes. Press **Save** to save your changes.

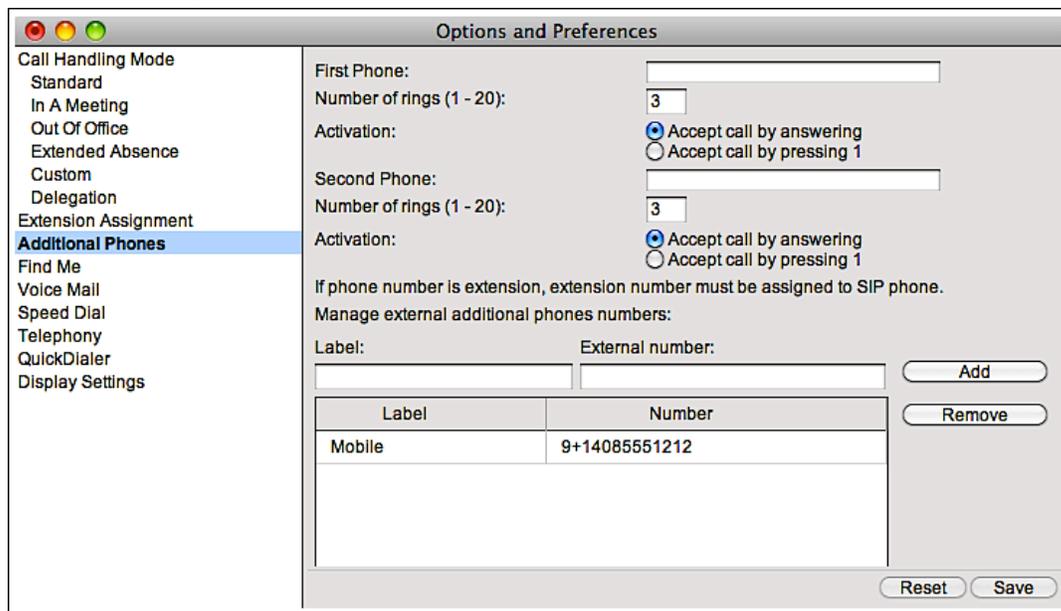


Figure 29 Configuring Additional Phones Assignment

Now that the phone numbers are configured, you must choose which Call Handling Modes will use this feature. The **Enable calling additional phones** checkbox programs each Call Handling Mode to use the Additional Phones feature.

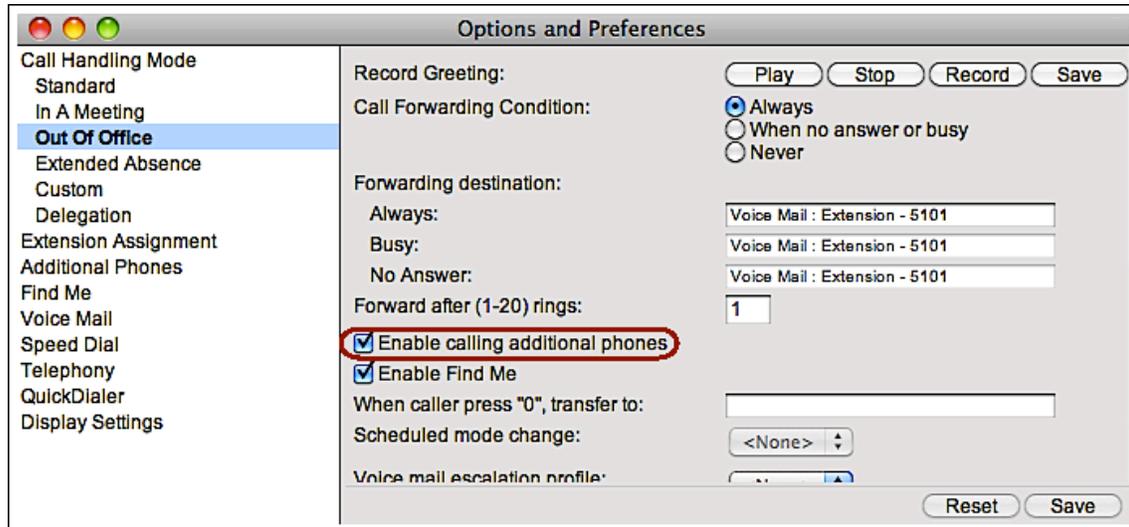


Figure 30 Enabling Additional Phones in a Call Handling Mode

Finally, the ShoreTel Communicator allows you to enable and disable the Additional Phone feature at any time. This allows you to turn the feature on and off whenever you need to without having to go back to the **Options and Preferences** window.

To use the Additional Phones feature, enable it by selecting **Enable calling** from the **Additional Phones** submenu in the **More** menu.

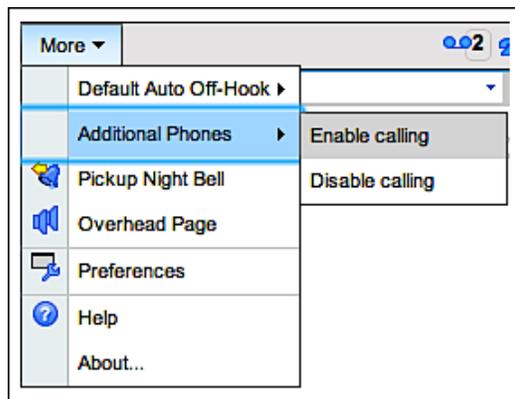


Figure 31 Enabling Additional Phones in a Call Handling Mode

Using Additional Phones – Incoming calls

Now that you have enabled the Additional Phones feature, each of your phones will ring when a call is presented to your extension. Simply pick up the phone to accept the calls on any of your devices. If you have configured Additional Phones to Accept call by answering, you will hear the caller as soon as you pick up. If you have configured Additional Phones to Accept call by pressing 1, you will hear the ShoreTel system announce the call and you must press 1 to be connected to your caller.

Using Additional Phones – Moving calls

Once you are on a phone call, you can move your phone call to another one of your additional phones by signaling to the ShoreTel system that you would like to move the call.

If you are talking on a ShoreTel IP phone, press the **Move** softkey button to ring the other phones. Once you pick up the ringing phone on one of the other devices, the call will be moved to that device.

Note: For the **212k** IP phone, you must press the **Menu** button to display the **Move** softkey.

If you are talking on an external phone (for example, your mobile phone), press *23 and the ShoreTel system will ring the other additional phones. Once you pick up the ringing phone on one of the other devices, the call will be moved to that device.

More information

Consult the **ShoreTel System Administration Guide** for more information on the Additional Phones feature.

[Back to Main Menu](#)

Customizing ShoreTel Communicator

Once you become familiar with the basic operation of the ShoreTel Communicator for Mac, you may want to change the look and feel of the interface. The ShoreTel Communicator for Mac allows you to create different views by allowing you to split windows and hide or show window panels.

Splitting panels:

ShoreTel Communicator panel manager button allows you to split panels (horizontally and vertically) and remove panels. You can split the Call Panel in the top part of the screen as well as the panels in the lower part of the screen.

Note: **The Call Panel must always be visible.**

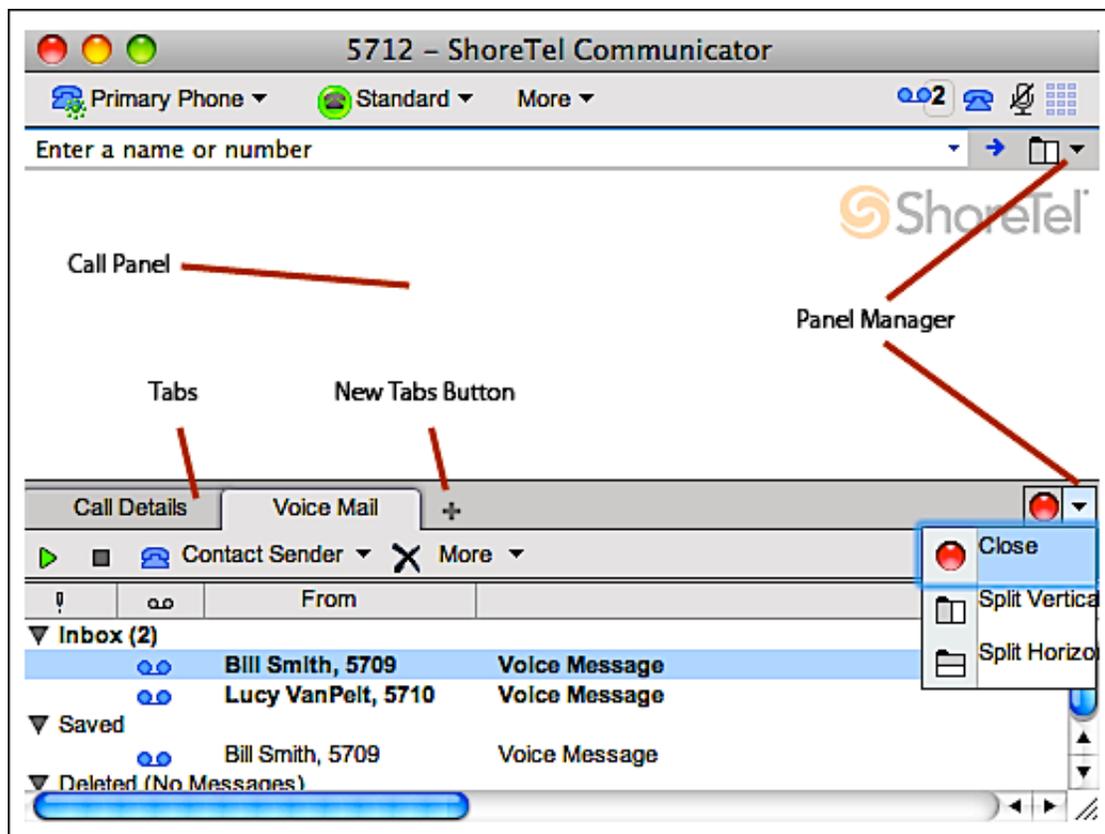


Figure 32 ShoreTel Communicator for Mac - Main Window

The figure below shows the Call Panel split with the History Viewer panel displayed.

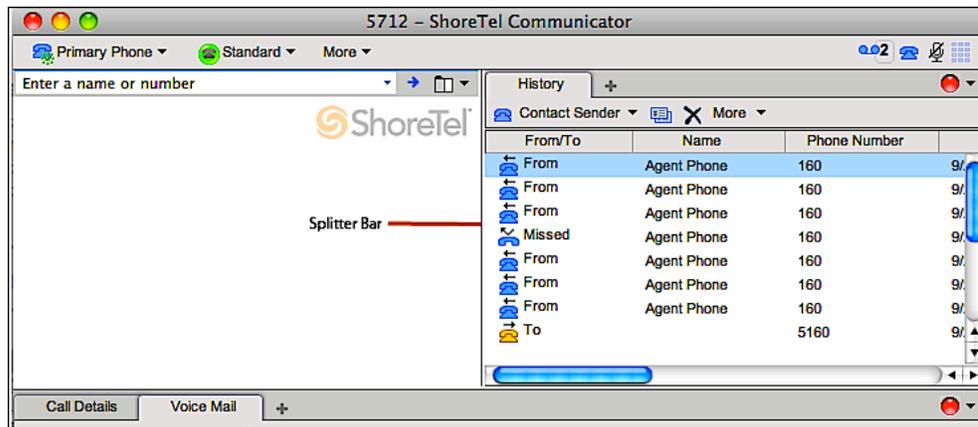


Figure 33 ShoreTel Communicator for Mac - Main Window Split

Note: If you add a tab for a panel that is already showing on the display, the tab will move the panel to your desired location and will be removed from its previous position.

Resizing Panels

Users can re-size the panel in the ShoreTel Communicator windows by moving the splitter bar between the panels.

Adding and removing tabs in panels

The New panel menu allows you to select a new viewer and add it into the panel's container. Tab panels include the "x" button for closing the window. The "x" is visible only when the mouse is hovering over the tab.

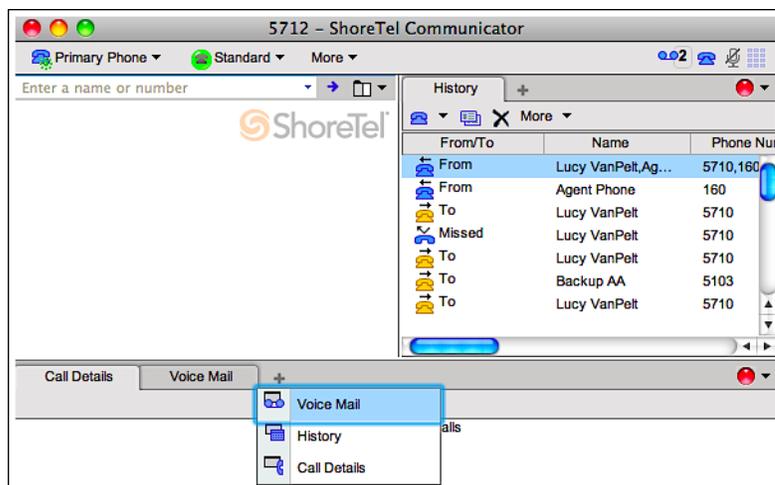


Figure 34 Adding and Removing Tabs in Panels

[Back to Main Menu](#)

Panels

The ShoreTel Communicator provides three panels to enable users to access information about voicemails and sent or received calls. In each panel, you can click on the column header to sort by the items in that column. For example, in the Voice Mail panel, you can sort your voicemails by the person who left the voicemail by clicking on the **From** column. Repeatedly clicking on the column header toggles the sorting order.

Voice Mail Viewer Panel

The Voice Mail Viewer panel is a graphical user interface for accessing your voice messages. You can use the Voice Mail Viewer panel tools to listen, respond to and delete messages.

Use the **Contact Sender** menu to either call the sender by phone or send them an email. Use the **More** menu to create a new voicemail message, forward or reply to the message or move the message between your Inbox, Saved and Deleted folders.

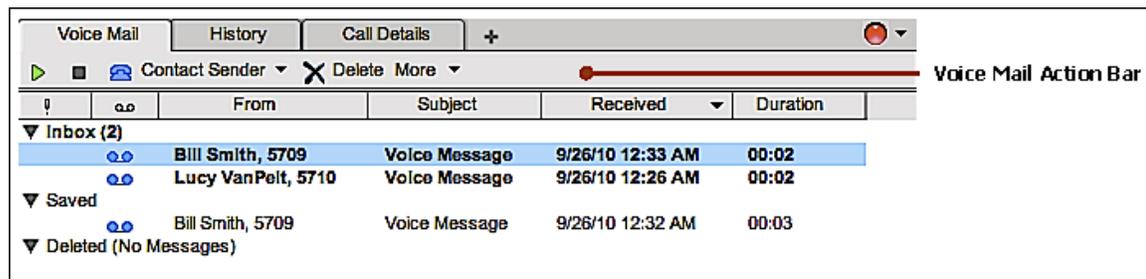


Figure 37 Voice Mail Panel

History Viewer Panel

The History Viewer panel displays information about your previous calls sorted by descending order of date and time. It shows the phone number of an outbound call's destination or inbound call's source along with the start time and duration of each call.

Use the **Contact Sender** menu to either call the sender by phone or send them an email. Use the **Properties** icon to view details about the call. It also allows you to view or edit call notes saved with the call. Use the **More** menu to choose which columns to display or clear the call history.

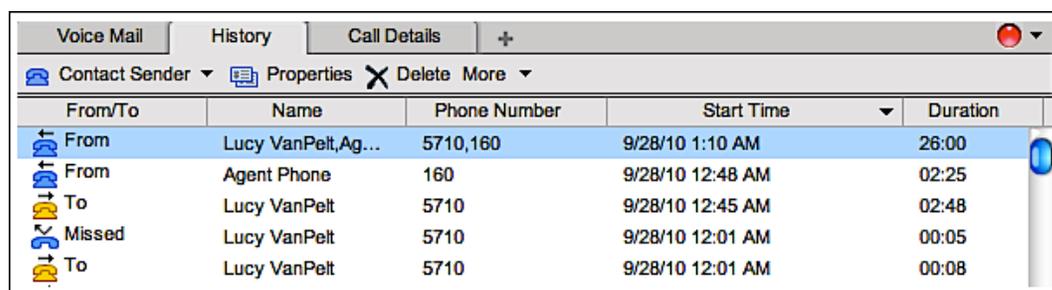


Figure 38 History Panel

Call Detail Viewer Panel

A call routing slip lists the call's originating and destination information, the duration of the call duration, the list of other extensions that handled the call, and the final disposition of the call. You view an active call's routing slip from the **Call Details Viewer** panel; you view the routing slip of a previous call by clicking on the **Properties** icon the **History Viewer** panel.

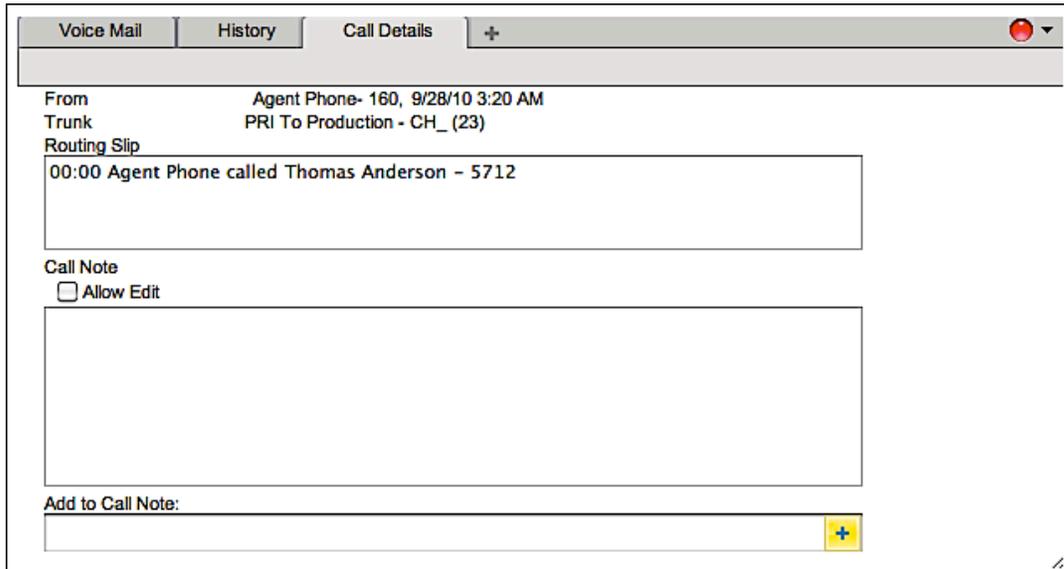


Figure 39 Call Detail Panel

[Back to Main Menu](#)

Changing Users

User Preferences

The ShoreTel Communicator for Mac user's panel configuration is stored on the ShoreTel server for each user. If a user logs in from a different machine, ShoreTel Communicator will still see their layout the way it was arranged when they last logged off. ShoreTel Communicator will also remember the tabs in each panel and sorting order.

Switching Users

The ShoreTel Communicator allows the user to change the login parameters after the initial installation. To switch users, select **Login as Someone Else ...** from the **Communicator** menu.



Figure 35 Switching Users – Menu Selection

Enter the new user parameters and press the Login button to save your changes.

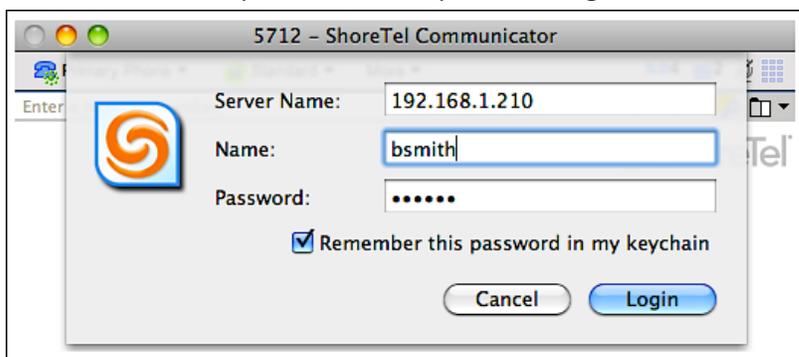


Figure 36 Switching Users – Changing User and Server Information

[Back to Main Menu](#)

Dialing your Contacts

Address Book Integration

The ShoreTel Communicator for Mac permits the user to dial from the Address Book. It also allows the user to upload the Address Book to the ShoreTel server to make it available to other Communicator clients.

The first time the user launches ShoreTel Communicator for Mac, a plugin is installed to enable integration of the user’s address book.

To dial a number in your address book, left mouse click on the phone number label and choose the “Dial Using ShoreTel” option. In the figure below, the user has clicked on the word “main” to the left of the phone number.

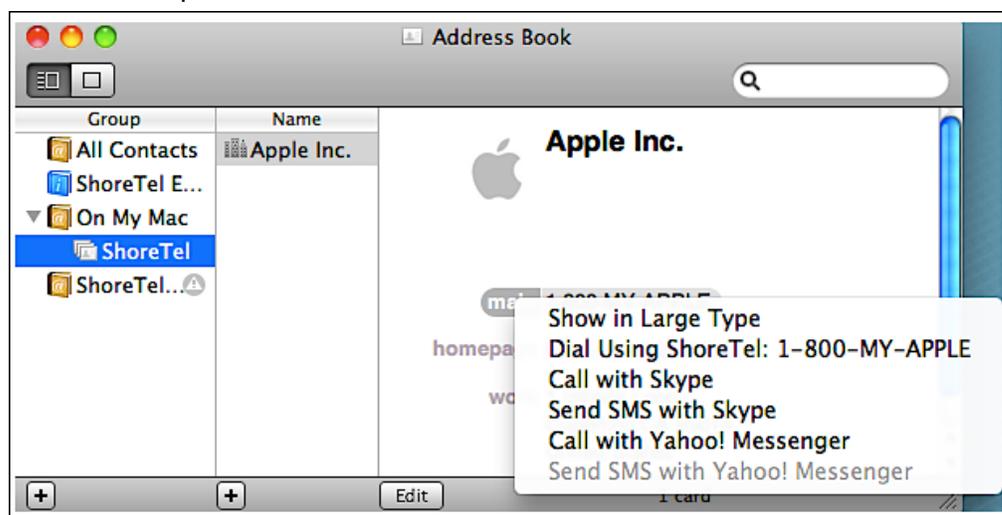


Figure 40 Dialing a contact in the Address Book

Services Integration

ShoreTel Communicator for Mac integrates with Mac OS X services to allow users to dial numbers in documents such as web pages, email text, etc. This functionality is available in any document or application that supports plain text selection integration with Mac OS X services. Placing calls using the Services Integration feature in ShoreTel Communicator is available from the applications shown in Table 3.

Integrated	Partially Integrated
<ul style="list-style-type: none"> • Safari 4.0 and higher • Preview • Address Book • TextEdit • Mail 	<ul style="list-style-type: none"> • Entourage • Opera

Table 3 Services Integration

Note: Some applications only partially support text selection Services. In those applications, this feature will work for some, but not all, parts of its user interface.

Dialing Phone Numbers from Services Menu

To dial numbers from the services menu:

1. Highlight or identify the phone number you wish to call.
2. From the Safari menu, select **Services -> Dial Using ShoreTel**. The call is placed using ShoreTel Communicator.

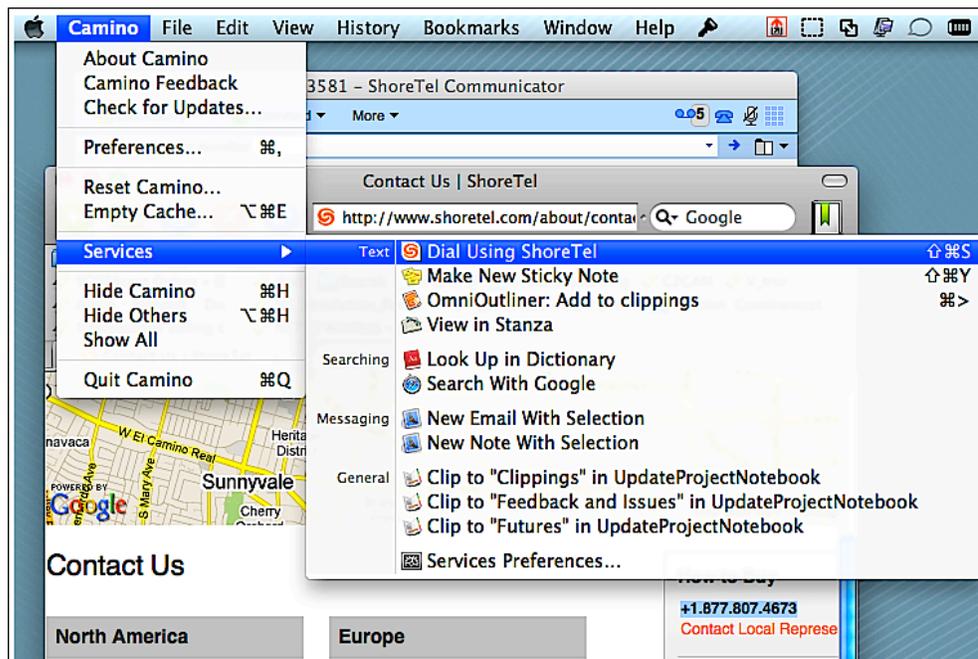


Figure 41 Services – Dial Using ShoreTel

Dialing Phone Numbers Using CTRL+Click/Right Click Option

To dial numbers from the services menu:

1. Highlight or identify the phone number you wish to call.
2. CTRL+click/right-click on the phone number to display the context menu.
3. Select the Dial Using ShoreTel option to place the call.



Figure 42 Dialing Phone Numbers Using CTRL+Click/Right-Click Option

[Back to Main Menu](#)

Customer Support Information

Logging and Tracing Window

ShoreTel Communicator for Mac tracing window displays information about session id and Call Application Server details. ShoreTel Communicator stores the last 100 logging and tracing messages. It also tracks all request responses to and from the Call Application Server.

Users can Open/Close logging and tracing window by placing the cursor inside of Quick Dialer editor and pressing CTRL+F9 keys. Users can use the window handles to expand the window.

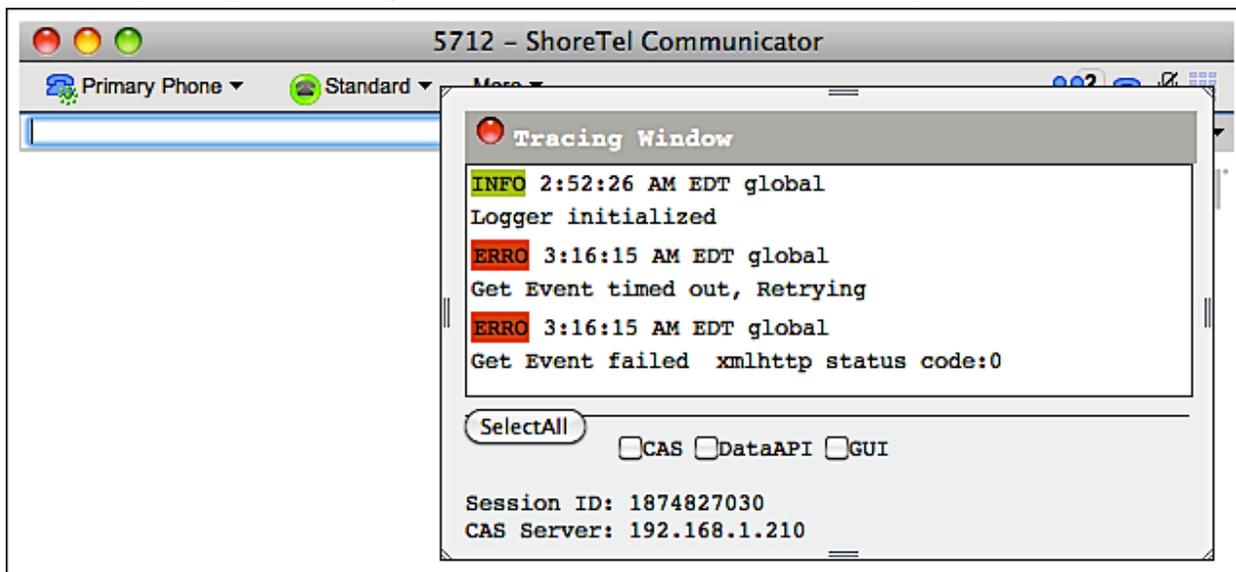


Figure 43 ShoreTel Communicator for Mac - Tracing Window

Note: In most cases, you will only refer to this window if prompted by your ShoreTel system administrator or by ShoreTel technical support.

[Back to Main Menu](#)