

MITEL

3600 | Hosted Key System

MITEL 5220 IP PHONE GETTING STARTED GUIDE
Release 3.0

 **MITEL** | it's about **YOU**

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Mitel 3600 Hosted Key System – Mitel 5220 IP Phone Getting Started Guide
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Welcome

Congratulations on acquiring your new Mitel® 3600 Hosted Key System!

The 3600 Hosted Key System provides all the features that small businesses use, without the up-front cost and ongoing maintenance inherent in owning a traditional phone system.

The 3600 Hosted Key System also provides the ability to self-manage your telephone system through an easy-to-use, intuitive graphical interface that runs on your web browser.

You can customize features, set up your own call coverage, and create your own personal phone layout.

Scope of this document

This document provides the basic information you need to start using and configuring your Mitel 5220 IP Phone. This document does not contain information on the operation of the phone with other devices. For additional information about the 3600 Hosted Key System features and capabilities, access the online help, provided on the telephone user web administration interface, or refer to the *Mitel 5220/5224 IP Phone User Reference Guide*.

Mitel 5220 IP Phone

The 3600 Hosted Key System supports the Mitel 5020 IP Phone and the Mitel 5220 IP Phone. The functionality of these two phones is the same.

Figure 1 illustrates the 5220 IP Phone model.

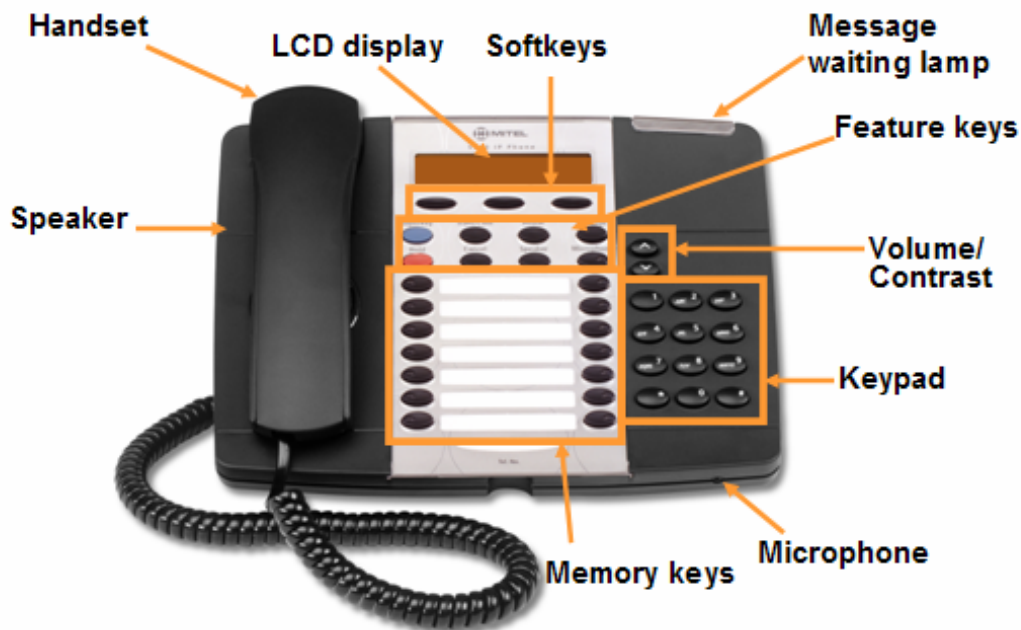


Figure 1: 5220 IP phone

Telephone keys

Following is a brief explanation of the functionality of each key:

Feature keys

Feature keys have fixed functionality and are located below the softkeys. These keys are:

- **Message** - Allows you to access and manage your voice mail box
- **Hold** - Allows you to put another party on hold
- **Transfer call** - Allows you to personally direct a call to someone else
- **3-Way Call** - Allows you to communicate with two other parties at the same time in a three-way call.
- **Scroll Up** - Allows you to scroll up through a list of items shown on your LCD display (such as the company directory)
- **Scroll Down** - Allows you to scroll down through a list of items shown on your LCD display (such as the company directory)
- **Speaker** - Allows you to talk to the caller with the handset on hook
- **Mute** - Allows you to stop your voice from being sent to the caller while you can still listen to the other party

Softkeys

Softkeys are the three keys located directly below the LCD display. The meaning of each key is context-dependant and is indicated by the display directly above the key.

When your phone is idle the display shows:

```
Extension: 314
REDIAL  CALLS  MENU
```

The function of each key is:

- **REDIAL** softkey allows you to see a scrollable list of the recent outgoing calls you made.
- **CALLS** softkey allows you to see a scrollable list of the recent incoming calls to your phone. If the **CALLS** softkey looks like ***CALLS** this means that there has been at least one unanswered call since the last time you viewed the list of calls received.
- **MENU** softkey allows you to see other available softkeys.

When the **REDIAL** softkey is pressed, the display shows:

```
1: Name
DIAL    TIME    QUIT
```

The function of each key is:

- **TIME** softkey displays the time and date of the call. The **NUMBER** softkey that is then shown in the center position shows the number of the called number when pressed. This allows you to toggle between the **TIME** and **NUMBER**. The position of the call in the call list is displayed in front of the phone number.
- Press the **DIAL** softkey to call a number from your **CALLS** list (if this is configured).
- Press the **QUIT** softkey to end your **CALLS** session.

When the ***CALLS** softkey is pressed, the display shows:

```
1: Name
DIAL    TIME    QUIT
```

The function of each key is:

- **TIME** softkey displays the time and date of the call. The **NUMBER** softkey that is then shown in the center position shows the number of the caller when pressed. This allows you to toggle between **NAME**, **TIME** and **NUMBER**. The position of the call in the call list is displayed in front of the phone number. A * beside the position of the call means that the call was not answered.
- Press the **DIAL** softkey to call a number from your **CALLS** list (if this is configured).
- Press the **QUIT** softkey to end your **CALLS** session.

When the **MENU** softkey is pressed, the display shows:



The function of each key is:

- **LOGOUT** softkey allows you to log out of your phone. Press the **MENU** softkey when your phone is idle to access the **LOGOUT** key.
- **DIR** softkey allows you to look up internal phone numbers on your LCD display. You can browse the directory using the **Arrow** feature keys. The **DIR** softkey is visible when your phone is active and is also available through the **MENU** softkey.
- Press the **QUIT** softkey to end your **CALLS** session.

Memory keys

Memory keys are the 14 keys arranged in two columns of seven keys below the feature keys. At least two of these keys are configured as Line Appearances - you need these to make and receive calls. Using the web administration interface, you can configure the rest of these keys as you wish (with certain restrictions). Some of the possible configurations are One Touch Speed Dial and Call Forward.

Volume/Contrast arrow keys

The volume/contrast arrow keys on your set can be used to do any of the following:

- Adjust the speaker volume (when using the speaker)
- Adjust the handset speaker volume (when using the handset)
- Adjust the contrast on your LCD display (when the phone is idle)
- Adjust the ringer volume (when the phone is ringing)

Telephone user basics

You can make and receive calls as soon as you activate your phone. Other things that you might like to do - like setting special speed dial memory keys - require you to connect to the web administration interface via your web browser. Table 1 outlines the basic tasks.

Table 1: Basic user tasks

Task	Description	Compulsory	Comments
Activate your phone	Connecting and activating your phone. See page 6	Yes	
Log into your phone	Logging in to your phone. See page 6	No	You must log in to your phone if the display shows Logged Out, ACTIVATE.
Log out of your phone	How to log out of your phone. See page 7	No	
Make phone calls	How to make a phone call. See page 6	Yes	
Answer phone calls	Answering a phone call. See page 9	Yes	
Log in to the web admin interface	How to log in to the web administration interface. See page 10	No	You must log in to set up your personal name announcement and to customize your phone.
Change your Personal Identification Number (PIN)	Changing your PIN. See page 11	No	You must log in to the web admin interface first.
Record your personal name announcement	Recording your name announcement. See page 11	No	Your personal name announcement allows the auto attendant to identify you to incoming callers.
Set up call coverage	Setting up your call coverage. See page 12	No	You must first log in to the web admin interface. Although not compulsory, setting up call coverage is highly recommended. If you are configured for voice mail you must set your call coverage to voice mail or you will not receive any voice mail messages.
Customize phone and other user features	Customizing phone and user features. See page 12	No	You must log in to the web admin interface first
Set up your voice mail name announcement and message	Setting up your voice mail. See page 13	No	Only available if you have been configured with voice mail service. Contact your administrator.

Using your phone

Connecting and activating your phone

Consult the installation instructions that are in the box with the phone for details on the installation requirements.

Logging in to your phone

Log in to a phone to direct all incoming calls for your extension to that phone. You require a PIN to log in to a phone. Your administrator will provide you with a PIN.

To log in to a phone, follow these steps:

1. Press the **ACTIVATE** softkey on an unassigned phone (a phone without a user logged in).

```
LOGGED OUT
ACTIVATE
```

```
Extension:
QUIT
```

2. Enter your extension.

```
Extension: 314
QUIT
```

```
PIN:
ENTER      QUIT
```

3. Enter your PIN.

```
PIN: *****
ENTER      QUIT
```

4. Press the “#” key or the **ENTER** softkey once you have finished entering your PIN.
The system verifies that the PIN is valid and then it logs you into the phone.

```
Extension: 314
REDIAL CALLS MENU
```

Notes:

- If you log in to a phone while you are logged in to another phone, the system will log you out of the original phone.
- You cannot log in or out, or activate a phone, while the phone is on an active call.
- If you are not logged into a phone, all calls to your extension go directly to your selected call coverage.
- If you have not been assigned the privileges required to log out of your phone you are not prompted for a PIN when you log in.
- You are not prompted for a PIN when you log in to a phone with a location extension.

Logging out of your phone

To log out of a phone, follow these steps with your phone on-hook:

1. Press the **MENU** softkey.

```
Extension: 314
REDIAL  CALLS  MENU
```

2. Press the **LOGOUT** softkey.

```
MENU
LOGOUT  DIR  QUIT
```

The LCD displays a confirmation message.

```
Confirm Logout
YES                NO
```

3. Press the **YES** softkey to proceed. The LCD will display the message Logout successful, confirming that you are logged out of the phone and the system. Incoming calls will be forwarded to Call Coverage. The display will return to a logged out/unassigned idle state.

```
Logout Successful
```

```
Logged Out
ACTIVATE
```

Notes:

- If your phone has been locked, you cannot log out of the phone. The **LOGOUT** softkey will not be displayed on your phone. Contact your system administrator for assistance.
- You cannot log in or out, or activate a phone, while the phone is on an active call.

Making a phone call

To make a phone call, follow these steps:

1. Lift the handset or press the **Speaker** key to select the next available Line Appearance.

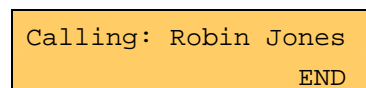


 **Note:** The **CALLS** softkey is not displayed if dialing from an incoming call list is not enabled.

2. To make an internal call dial the extension or to make an external call, dial the prefix required for external dialing (usually "9") followed by the number you want to call.

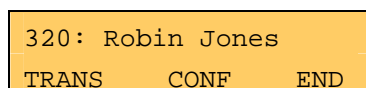


When you finish dialing the call is placed.



If you place an internal call, the LCD screen displays the extension and name of the connected party once the call is answered. If you place an external call, the LCD screen displays the name of the connected party, or if the name is unknown, the phone number.

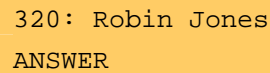
3. To end the call, press the **END** softkey, replace the handset, or press the **Speaker** key.



Answering a phone call

When an incoming call is received on a phone, several things happen:

- The phone rings,
- A Line Appearance light flashes, and
- The LCD displays the name of the caller, if known. If the name of the caller is unknown, either the phone number or Unknown Caller is displayed.

A screenshot of a phone's LCD display. The display is yellow and shows the text "320: Robin Jones" on the first line and "ANSWER" on the second line.

320: Robin Jones
ANSWER

To answer your phone using the handset, lift the handset.

To answer your phone using the speakerphone, choose one of the following methods:

- Press the flashing **Line Appearance** Key.
- Press the **Answer** softkey.
- Press the **Speaker** key.

Ending a call

To end a call that is in progress, choose one of the following:

- Press the **END** softkey.
- Replace the handset.
- Press the **Speaker** key.

Using your web browser

Logging in

To log in to the telephone user web administration interface, follow these steps:

1. Open your web browser (Internet Explorer 6.0 or Firefox 1.5.0.4)
2. Enter the URL for telephone users (provided by your service provider or administrator).
The Login screen appears.
3. Enter your extension and PIN (provided by your service provider or administrator). Your personal Home page appears.
4. Select **My Settings** on the left-hand frame to see the actions available to you.
The Home page displays the options available to you.

The following screen shot illustrates the Home page:



Changing your PIN

Your Personal Identification Number (PIN) is a sequence of 4 to 6 numbers assigned to you by your administrator. This PIN is needed in order to activate your phone and to log in to the web administration interface.


To change your PIN, follow these steps:

1. Log in to the web administration interface.
2. Select **My Settings** in the left menu.
3. From the menu appearing in the main frame, select **Change my PIN**.
4. A window will pop up: follow the on-screen instructions.
5. **Save** your changes.

Your new PIN is now active for both web access and phone login.

Recording your name announcement

Callers hear your recorded name announcement as confirmation when they use the auto attendant name directory to contact you.

 **Note:** The recorded announcement is for the auto attendant. It is not your voice mail greeting.

To record, or re-record your name announcement, follow these steps:

1. Log in to the web administration interface.
2. Select **Personal Details** in the left menu.
3. Select the **Record Name Announcement** button on the **Personal Details** page.
4. A Record Prompt pop-up window is displayed.
5. Confirm that the extension displayed matches the phone you want to use. If the extension is not the same, enter an alternate extension.
6. Select the **Call** button.
7. When your phone rings, lift the handset to answer.
8. Listen to a brief set of audio instructions: "Please record your message after the tone. When you are finished, press # for more options".
9. When you hear the tone, record your name into the handset.
10. When you are finished, press the # key.
The system plays the following set of options:
 - To listen to the recording, press **1**.
 - To save the recording, press **2**.
 - To re-record, press **3**.
 - To exit without saving changes, press *****.
11. Press **2** to save the name announcement.
12. Replace the handset.
13. Select the **Close** button on the pop-up window.

Setting up your call coverage

Call coverage allows you to specify where calls you do not answer should be directed. Call coverage options include voice mail, an auto attendant, a co-worker's extension, or another phone number such as your home number or cell phone.

To configure your call coverage, follow these steps:

1. Log in to the web administration interface.
2. Select **My Settings** in the left menu.
3. From the menu appearing in the main frame, select **View and edit call coverage options**.
4. The main frame will display the call coverage options. Follow the on-screen instructions.
5. **Save** your changes.

Your Call Coverage is now set.

For a more detailed explanation of call coverage and its options, see the help provided online by clicking on the Help link in the top right-hand corner of the web administration screen.

Customizing phone and user features

To customize your phone features, follow these steps:

1. Log in to the web administration interface.
2. Select **My Phone** in the left menu.
This will display by default the type of phone you are logged in to.
3. Select **Mitel 5220 IP Phone** from the **Phone Model** drop-down list if this is not already displayed.
4. Select the memory key that you want to program.
A Program Memory Key Details window appears.
5. Select the feature to assign to the key from the **Feature** drop-down list. A description of the feature is displayed above the Feature field.
When a feature is selected this may populate other fields on the page.
6. Type the information that you want to appear on phone key label in the **Label** field.
7. Depending on the feature selected, enter the number as to where the call is directed in the **Details** field or select an option from the drop-down list.
8. Select **Save** to save your changes or **Close Window** to cancel your changes.

Following are the possible options for configuration:

- **Default** - Restore a key back to its original profile setting.
- **Company Speed Dial** - Configure the key to automatically dial anyone in the Company Speed Dial list.
- **Forward to AA** - Automatically forward all calls to the 3600 Hosted Key System's built-in auto attendant. Your company can have multiple auto attendants for different purposes.
- **Forward to Coverage** - Automatically forward your calls to your coverage setting (such as your voice mail).
- **Forward to Co-worker** - Automatically forward calls to a co-worker in your company.
- **Forward to Number** - Automatically forward your calls to any number that you have programmed.

- **Forward to Prompt** - Automatically forward to a number that you enter when you activate the feature.
- **Line Appearance** - A key used for making and receiving regular calls.
- **One Touch Speed Dial** - Set a key to automatically dial a given number that you indicate.
- **Page** - Automatically page co-workers who are not currently using their phone through their phone speakers.
- **Park/Retrieve** - Place a call on hold at a park location where it can then be retrieved by anyone else in the company with the Call Park feature programmed on their phone.
- **Unassigned** – Put the key back into neutral mode.

The options below are configurable but do not appear unless specifically set up by your administrator.

- **Account Codes** – Associate an account code to a call before or during the call.
- **Join/Leave Group** - Register with a call group that acts as pool for incoming calls.
- **Monitor Call** – Monitor incoming calls on another user's line. This feature will also allow you to pick up the call in the event that the primary user is busy.
- **Monitor Phone** – Monitor another user's phone for activity. This feature is useful when it is necessary for a customer to speak with someone immediately.
- **Monitor Call Silent** - Monitor incoming calls on another users line using only the visual indication. You can also answer the call.

For a more detailed explanation of any of these features, see the help provided online by clicking on the Help link in the top right-hand corner of the web administration screen.

Setting up your voice mail

Follow these steps to set up your voice mail:

1. Press the **Message** button on your phone.
2. Follow the recorded instructions to set up your voice mail password and your outgoing messages.

Your voice mail is now set up. Use the **Message** button to retrieve voice mail. Your message-waiting lamp lights up when you have a voice mail message.

Glossary

Auto Attendant - An automated system that directs incoming calls to the appropriate extensions.

Call Coverage – A feature of the 3600 Hosted Key System that directs unanswered calls to an auto attendant, voice mail, or an alternative number.

IP - Internet Protocol. A simple data networking protocol used in the World Wide Web and many private data networks.

Location - A special kind of user associated with a telephone that is normally in a fixed location (such as a conference room phone).

Monitor Group. A type of call group that allows telephone users to see the status of other users' lines or phone.

PIN – Personal Identification Number. A unique number assigned to a user that acts as a password allowing them to log in to the Web Interface and phone.

3600 Hosted Key System - The product provided by Mitel to provide telephone service in a small business IP data network

User - An individual with access to the web interface of the 3600 Hosted Key System product. A user has an associated user ID and PIN number. From the perspective of a tenant, a user also has an associated telephone extension.

User ID - A unique identifier associated with a user. For most users, this is the same as their telephone extension.