ShoreTel Mobility for iPad®

User Guide

Release 7.0

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Contents

Before You Start

This guide is for those using the ShoreTel Mobility Solution with the *Apple*® *iPad*®. Basic understanding of iOS features and functionality is presumed. The following procedures may vary slightly depending upon the iPad version.

Documentation Overview

This guide is documented as described in the following sections.

Table 1: In this Guide

Chapter	Title	Description
1	Installing and Connecting ShoreTel Mobility for iPad	Installing and provisioning the ShoreTel Mobility app.
2	Getting Started	High level feature and User Interface description of the ShoreTel Mobility Application for iPad.
3	Managing Calls	Place and receive calls, put a call on hold, take another call, switch between active calls, transfer calls to another number or your desk phone, access enterprise voice mail, and make conference calls.
4	Presence and Instant Message	Enable Presence, manage your location and status, manage Buddies and Groups, and use instant message.
5	Today	Display calendar information and join audio or web conferences.
6	Secure Remote Access	Securely place and receive calls using any Wi-Fi network or VoIP over cellular data network outside of the enterprise.
7	Searching People, Places and Things	Search the corporate directory for a contact, a phone number or conference room. Add a contact and add/delete favorites.

Table 1: In this Guide

Chapter	Title	Description
8	ShoreTel Mobility Settings	View and/or modify ShoreTel Mobility application settings.
Appendix A	URL-Based Dialing	Use the URL-based dialing feature from an email to join conferences or dial extension digits to an automated attendant.
Appendix B	Extension Assignment and Call Handling Mode	Describes ShoreTel Communicator features Extension Assignment, Visual Voice Mail and Call Handling Mode.

Conventions

The following typographical marking conventions are used in this document.

Marking	Meaning
Bold	Names of interface objects, such as buttons and menus.
`Courier`	Code examples.
`Courier Italic`	Variables in code examples.
Blue	Cross references with hyperlinks. Click the blue text to go to the indicated section. All chapters have a list of section links on the first page. **Note:** Table of Contents entries are also links, but they are not shown in blue.

Related Documentation

Publications in the ShoreTel Mobility solution documentation suite include the following:

- ShoreTel Mobility Router Administrator's Guide

- ShoreTel Mobility Router Hardware Installation Guide

- ShoreTel Mobility (mobile device) User's Guide

- ShoreTel Mobility (mobile device) Quick Reference Card

- ShoreTel Mobility Platform Support Guide

- ShoreTel Mobility Release Notes

CHAPTER

1

Installing and Connecting ShoreTel Mobility for iPad

Use ShoreTel Mobility for iPad to make and receive calls, access corporate telephony features such as conferencing, forwarding, and corporate directory lookup of contacts, as well as advanced features such as using presence, instant message and Bluetooth.

This chapter provides instructions about how to install the ShoreTel Mobility Client and contains the following sections:

- "Before You Begin" on page 2

- "Setting Up a Wi-Fi Access Point" on page 3

- "Download and Install the ShoreTel Mobility Client Application" on page 3

- "Update to the Latest ShoreTel Mobility Client" on page 5

- "Uninstall ShoreTel Mobility Client" on page 6

Before You Begin

Ensure you have the following information and settings established before you install the ShoreTel Mobility client application:

- A data connection (Wi-Fi or cellular data). Refer to your Apple® iPad® documentation for information about how to set up a data connection.

- If applicable, your credentials (used for authentication) for the Wi-Fi access point. This information is necessary if you need to set up a Wi-Fi access point on your iPad.

- If applicable, the security mode used by the access point (for example, WPA or WPA2).

- ShoreTel Mobility Router local, and if applicable, remote IP address or fully qualified domain name (FQDN).

- Username and password required for authentication on the ShoreTel Mobility Router.

- Time, date, and time zone are set on the iPad before installing the application.

Setting Up a Wi-Fi Access Point

Refer to your *Apple® iPad®* documentation for information about how to connect to a Wi-Fi network. A data connection is required to download the ShoreTel Mobility application.

> **Note**
>
> Use iTunes to download the ShoreTel Mobility app if a data connection is not available. Refer to "Download ShoreTel Mobility via iTunes"

Download and Install the ShoreTel Mobility Client Application

To download and install the ShoreTel Mobility Client on your mobile device, select the link in the email that you receive from the ShoreTel Mobility Router. You can also download and install the ShoreTel Mobility Client using either the App Store or iTunes.

- Download ShoreTel Mobility client via the App Store. See "Download ShoreTel Mobility via the App Store".

- Download ShoreTel mobility client via iTunes. See "Download ShoreTel Mobility via iTunes".

Make sure your device is connected to a Wi-Fi network before you begin. When the device is connected to a Wi-Fi network, the Wi-Fi icon on the Home screen is lit and is white.

To download, install, and provision the ShoreTel Mobility Client via email message:

1. When you receive an email message from either your ShoreTel Mobility administrator or from the ShoreTel Mobility Router, select the link for downloading and installing the client, as follows:

   - If you are on-site, you are directed to a web page on your mobile devices which guides you through downloading and installing the client from the App Store.

   - If you are installing the client remotely, copy the link from the email message, paste the link into your mobile device's browser, and go to that web site for instructions.

   - When prompted, touch **OK** to allow the ShoreTel Mobility Client to use your current location.

2. After you install the ShoreTel Mobility Client, select the provisioning link from the ShoreTel email message and follow the prompts to provision your mobile device.

3. If prompted, enter your enterprise user name and/or password.

Note

You can provision up to 5 devices (per account) based how your ShoreTel Mobility Router is configured. Check with your ShoreTel Mobility administrator if you encounter a conflict. The Primary Device is how your location is determined, so it should be the device you carry all the time. You can use all of your devices to make or receive calls, instant messages, and more.

4. Select the ShoreTel Mobility Client icon to open the application. While the ShoreTel Mobility Client connects to the server, a popup appears. Select **Dismiss** to continue.

5. Each time you open the ShoreTel Mobility Client, the **Registering** screen appears while the application is connecting to the server. You can check **Do not show again** to turn this off.

Note

The ShoreTel Mobility Client uses the native Apple method for determining location. The Client identifies which country your phone is in before making an outbound cellular call, in the following priority (only one is required):

- Cellular radio location (such as MCC)
- GPS or Wi-Fi based location
- manual input from you about your location when you are prompted for it

Download ShoreTel Mobility via the App Store

Complete the following steps to download the ShoreTel Mobility Client via the App Store:

1. From the iPad Home screen, select the **App Store**.

2. Enter ShoreTel in the **Search** field. Locate the ShoreTel Mobility Client application and select **Install**.

3. Enter your **Apple ID** and **Password** and select **OK**.

Download ShoreTel Mobility via iTunes

1. On your Mac or PC, launch iTunes®. In the iTunes store, enter ShoreTel in the **Search Store** field.

2. Locate the ShoreTel Mobility Client application and select the **Application** button.

3. Select the **Free App** button to download.

4. Enter your **Apple ID** and **password** in the application popup and select **Get**.

5. The application automatically downloads into the local iTunes applications folder.

6. In iTunes, select the iPad device in the left pane.

7. Click on the **Applications** tab.

8. Check the **Sync Applications** box.

9. Check the **ShoreTel** box.

10. Click **Apply**. The ShoreTel Mobility Client downloads to your iPad within approximately one minute.

11. Check your iPad applications to verify that the ShoreTel Mobility client has synced and downloaded correctly.

Select a Notification Type

1. From the Home screen, select **Settings > Notifications**.

  ❑ Select the **ShoreTel** application**.**

  ❑ Enable or disable the **Notification Center**.

If enabled, select the preferred notification **Alert Style**. Refer to your Apple® iPad® documentation for more information regarding notification types.

Reprovisioning After Initial Installation

> **Note**
> When your iPad connects to the Mobility Router the first time, you may be prompted to enter presence and/or ShoreTel Communicator passwords if these features are enabled, and your credentials could not be automatically determined. Refer to "Communicator" for more information.

Reprovisioning is not required unless you get a new mobile device, or if your Mobility user account is deleted from the Mobility Router.

You can reprovision your mobile device when it is connected to a Wi-Fi network.

If your ShoreTel Mobility user account is configured to access secure enterprise services over cellular data, you can also provision while connected to a cellular data network.

To reprovision the mobile device:

1. From the ShoreTel Mobility client main screen, select ⚙ **> Provisioning.**

2. Follow the instructions on the screen.

Update to the Latest ShoreTel Mobility Client

New updates display in iTunes or the AppStore when they become available. Update the ShoreTel Mobility Client when this alert displays.

> **Note**
>
> If you see the following error message, update your Client to a newer version:
>
> "Provisioning Error - Your account is prohibited to add device with old Client Version (below 6.0)."
>
> To update your Client, check the app store or iTunes to find the latest version.

Uninstall ShoreTel Mobility Client

Refer to your *Apple*® *iPad*® documentation for information about how to manage application, including how to uninstall an application.

CHAPTER
2

Getting Started

The ShoreTel Mobility client integrates your mobile device with other phones, such as your desk phone. ShoreTel Mobility enables you to use your mobile device to make and receive calls or send and receive instant messages, as well as utilize enterprise telephony features, such as conferencing, call forwarding, or corporate directory lookup of contacts.

Before configuring the ShoreTel Mobility Client, read this chapter to familiarize yourself with how client is integrated with your mobile device.

This chapter contains the following sections:

■

Using ShoreTel Mobility

The following sections provide a high level overview of each functional area of ShoreTel Mobility for iPad:

- "Title Bar" on page 9

- "Tab Bar" on page 10

- "Launcher Functions" on page 10

- "Session Manager" on page 11

Figure 1: Mobility for iPad User Interface
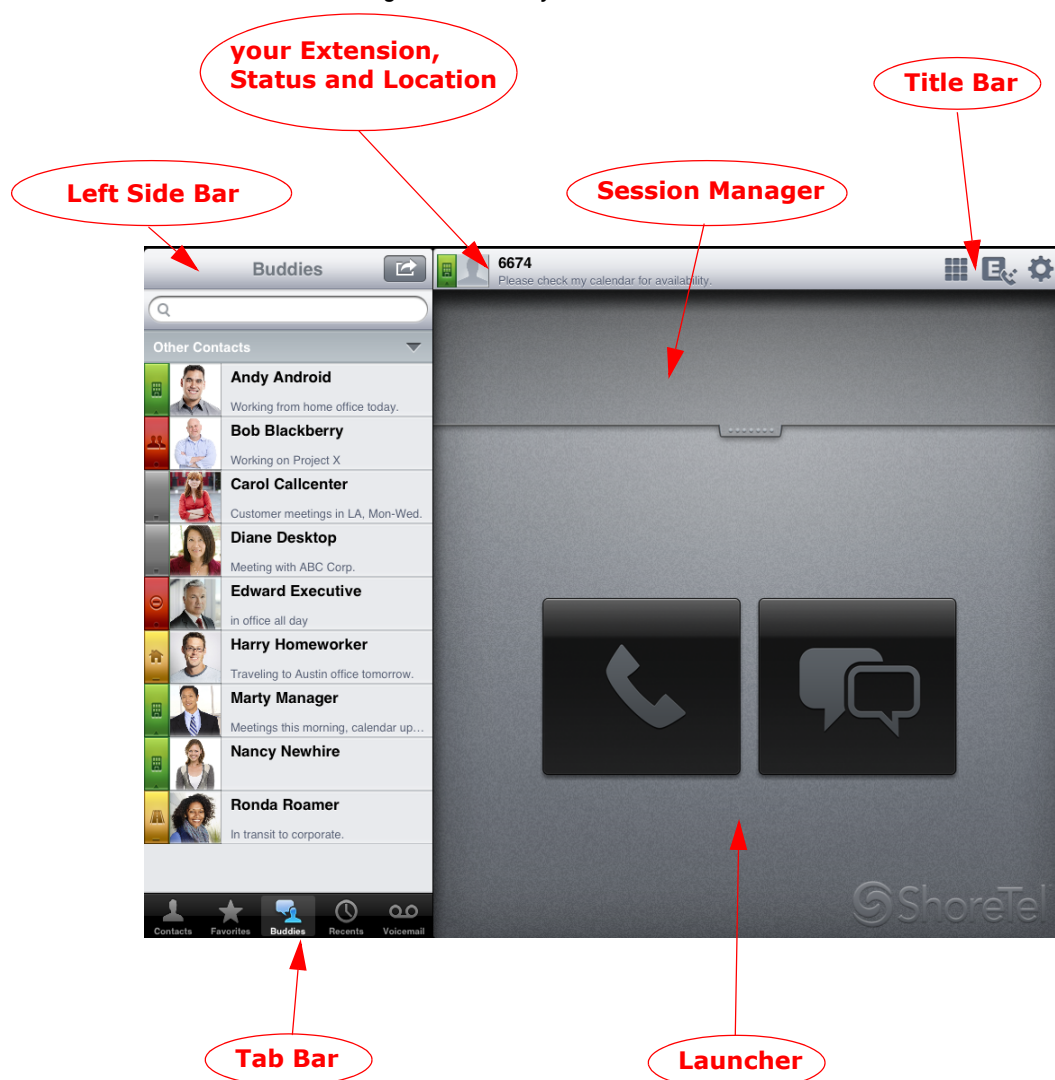
When the Mobility client is active, the Title Bar functions described in Table 2 are available:

Title Bar

Table 1: Title Bar Description

Function	Icon	Description
Status/Location	Refer to Table 1 and Table 2	Displays your presence status and your network location.
Extension	Refer to Figure 1	Displays your enterprise extension.
Keypad	⚏	Pops up the keypad to dial calls.
Data Registration	E	Displays when connected to the enterprise network. Voice calling is not enabled. Touch the icon to view details.
VoIP Registration	E	Displays when connected to the enterprise network. Voice calling enabled. **Note**: This icon indicates that VoIP is available but does not guarantee that all calls are made and received using the Wi-Fi network. Touch the icon to view details.
Not Registered	!	Displays when there is no data connectivity, or you are disabled or not authorized on the Mobility Router. Touch the icon to view details.
Settings	⚙	Pops up the Settings menu. Refer to "ShoreTel Mobility Settings" on page 60 for details.

Tab Bar

Table 2: Tab Bar Description

Function	Icon	Description
Contacts		View your contacts. When Presence is enabled, the contact's status and location displays next to the contact on the Contacts tab.
Favorites		View contacts marked as favorite.
Buddies		When Presence is enabled, the buddy's status and location displays next to the buddy on the Buddies tab.
Recent Calls		View the most recent activity in the call log.
Voice mail		Access enterprise voice mail.
Today		Displays Calendar and Conference items. Refer to "Today" on page 40 for details.

Launcher Functions

Table 3: Launcher Description

Function	Icon	Description
Call		Drag a contact or buddy on to this icon in the Launcher to initiate a call.
Instant Message		Drag a contact or buddy on to this icon in the Launcher window to initiate an IM.

Session Manager

The Session Manager area holds inactive sessions windows for calls and instant messages. For example, if you placed a call on hold in order to place another call, a thumbnail view of the first session displays in the session manager. Tap the thumbnail in the session manager to activate this session.

Figure 2: Session Manager

CHAPTER

3

Managing Calls

Using the ShoreTel Mobility application, you place and receive calls, put a call on hold, take another call, switch between active calls, transfer calls to another number or your desk phone, access enterprise voice mail, and make conference calls.

This chapter contains the following sections:

Receiving Calls

The ShoreTel Mobility Client displays a popup notification when there is an incoming call.

Note

Notifications must be set to receive this popup

This section describes how to receive calls on the ShoreTel Mobility client:

ShoreTel Mobility App is Running in the Foreground

- Answer—Touch Answer.

- **Ignore**—Touch **Decline**.

ShoreTel Mobility App is Running in the Background

- Answer

  - Notification style "None"—Launch the Mobility Client app. The call is automatically answered.

  - Notification style "Banner"—Touch the banner.

  - Notification style "Alerts"—Touch **Answer**.

- Decline

Note

Declined or ignored calls are shown in your call log as missed calls.

- Notification style "None"—Press the volume button up or down to silence the ringer.

- Notification style "Banner"—Press the volume button up or down to silence the ringer and dismiss the banner.

- Notification style "Alerts"—Touch **Close**.

Accepting or Declining a Call While on Another Call

While on a call, the screen and call waiting tone indicate there is another incoming call.

To answer a call while on another call:

- Select **Answer** to answer the incoming call and put the first call on hold. The incoming call becomes the active call.

To decline a call while on another call:

- Select **Answer and hangup** to answer the incoming call and end the first call.

- Select **Decline** to decline the incoming call.

Receiving a Call when the iPad is Locked

If you receive a call and your iPad is locked, you can:

- **Answer**—Select **Slide to Answer**. If appropriate, enter your password. The call is immediately answered and the in-call options appear.

- **Ignore**—Press the top On/Off (Sleep/Wake) or the volume button. The call is ignored and placed into your call log as a missed call.

Enabling Do Not Disturb (DND)

To reject incoming calls before the device rings:

1. Touch the **Settings** icon.

2. Touch **Call Settings**.

3. Touch **Do Not Disturb.** Select the length of time for DND to be active.

    - Select **Off** to revert to allowing incoming calls to ring the device.

Tip

Refer to "Setting Do Not Disturb (DND)" on page 28 for alternative DND settings.

Receiving a Call while Paired with Bluetooth

- Touch **Answer**.

Note

If a Bluetooth device is paired, the default audio path is with the Bluetooth device.

Note

When using Bluetooth in a call, select Audio to view the AirPlay window and switch the call to another audio device, if available.

For more information on pairing and unpairing your Bluetooth device, refer to your Bluetooth and/or Apple iPad documentation.

Placing Calls

Use the following methods to place a call from the ShoreTel Mobility application:

- "Calling Using the Keypad" on page 15

- "Calling Contacts, Recents, Favorites and Buddies" on page 16

- "Placing a Call While on an Active Call using the Keypad" on page 17

- "Placing a Call While on an Active Call by Touching a Contact or Buddy" on page 17

- "Placing a Call While on an Active Call by Touching a Favorite or Recent" on page 17

Calling Using the Keypad

1. Touch the keypad   in the title bar and enter a number.

2. Touch **Call**.
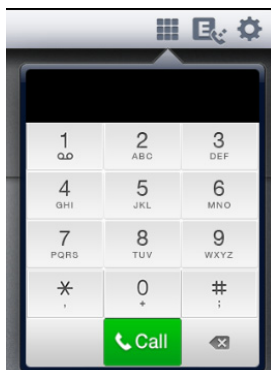
Calling Contacts, Recents, Favorites and Buddies

The following section describes how to place a call using gesture-based touches or actions within each Tab mode.

Table 1: Contacts

Gesture	Description
Touch a 👤	Select the number to call.
Touch + Hold 👤	A check mark ✓ appears to the right of the contact name. Drag and drop the contact onto the phone icon in the launcher.

Table 2: Recents

Gesture	Description
Touch a 🕐	Place call.

Table 3: Favorites

Gesture	Description
Touch a ⭐	Place call.
Touch ⊙	View caller information. Select appropriate action as displayed.

Table 4: Buddies

Gesture	Description
Touch a 👥	Place call. Refer to Table 1 for status information.
Touch + Hold 👥	A check mark ✓ appears to the right of the buddy name. Drag and drop the buddy onto the phone icon in the launcher.

Note

Presence must be enabled to call a buddy. Refer to "Enabling Presence" on page 27 for more information.

Placing a Call While on an Active Call using the Keypad

1. Touch the keypad ⊞ in the title bar and enter a number.

   Note

   The keypad that displays in the current call launcher window is used for entering call-related numbers, such as "Dial 1 to hear your voice mail" or entering numbers for a conference call. This keypad is not used for dialing a new outbound call.

2. Touch **Call**. The original call is placed on hold and moved to your session manager. The new call is active in the launcher window.

3. Touch the original call in the session manager to return to that call. This swaps the two calls, placing the other call in the session manager window and returning the original call to the launcher window.

Placing a Call While on an Active Call by Touching a Contact or Buddy

1. Touch a contact or a buddy to display information.

   Note

   Presence must be enabled to call a buddy. Refer to "Enabling Presence" on page 27 for more information.

2. Touch the appropriate phone number. The original call is placed on hold and moved to your session manager. The new call is active in the launcher window.

3. Touch the original call in the session manager to return to that call. This swaps the two calls, placing the other call in the session manager window and returning the original call to the launcher window.

Placing a Call While on an Active Call by Touching a Favorite or Recent

1. Touch an entry in the **Favorites** or **Recents** list. The contact is automatically dialed. The original number is placed on hold and moved to your session manager. The new call is active in the launcher window.

2. Touch the original call in the session manager to return to that call. This swaps the two calls, placing call #2 in the session manager window and returning the original call to the launcher window.

In-Call Icons

The followings display when in a call.

Table 5: In-Call Icons

Function	Icon	Description
Wi-Fi call		Displays when a call is using the Wi-Fi network.
Cell Data call		Displays when a VoIP call is using cellular data.
Conference		Displays when in a conference call.

Using Voice Mail

An Enterprise voice mail icon displays indicating you have a voice mail message. Access voice mail using one of the following methods:

Listen to Messages

1. To access voice mail to hear your messages one at a time:

   ■ Press and hold the "1" key, or

   ■ From the tab bar, select **Voicemail** ◌◌ . In the upper right corner of the Voicemail window,

   touch 📞.

> **Note**
>
> This method requires ShoreTel Communicator to be enabled.

2. Use your native voice mail options to replay, save or delete your messages. Refer to your Apple® iPad documentation for more about voice mail.

Use Visual Voice Mail

This feature requires that ShoreTel Communicator for Mobile is enabled. Refer to "Communicator" on page 63 for information.

Select **Voicemail** to view and play voice mail messages. A number displays indicating the current total of unheard messages. Messages that have not been listened to are displayed in bold text. Messages that have been listened to are displayed in plain text.

In addition, use this option to **Call Back** the originating number or to **Delete** a voice mail from the list of messages.

To use visual voice mail:

1. From the tab bar, touch **Voicemail.** ◌◌

2. Select/highlight a voice mail message from the list.

3. Touch play ▶.

To place a call to the originating number:

1. Select a voice mail message from the list.

2. Touch **Call Back**.

To delete a voice mail message:

1. Select a voice mail message from the list.

2. Touch **Delete**.

Using the In-Call Features

This section describes the in-call features for the ShoreTel Mobility client. The active call window displays several options while in a call. Table 6 describes the options available in the active call window, in addition to the following:

- ■ "Using Conference" on page 22

- ■ "Emailing a Contact" on page 23

- ■ "Sending Chat" on page 23

Table 6: In-Call Features

Function	Description	Icon
Hold	Place an active call on hold.	⏸
Mute	Mute your voice on an active call. **Note**: Switching between calls un-mutes the call.	🔇
Audio	Place an active call on speaker, headset or Bluetooth device as appropriate.	🔊
Keypad	Enter call-related numbers, such as "Dial 1 to hear your voice mail", digits for a conference call, passwords, etc.	⠿
Transfer	Transfer a call to a specified phone number or to your desk phone. Refer to "Using Transfer" on page 20 for details.	➡

Using Transfer

While you are on an active call, you can transfer the call to your desk phone, to one of your additional provisioned devices, or to another contact.

By default, transferring a call to your desk phone transfers to your enterprise extension. For more information, see "Call Handling" on page 61.

Transferring to Other Device

1. During the active call, touch **Transfer** ➡️. The call is put on hold.

2. By default, selecting **To Other Device** transfers this call to your desk phone. The other devices start ringing and the transfer completes when the call is answered.

Note

Depending upon your IP PBX, if you have more than one device, the call rings all other devices. Contact your system administrator for details regarding your IP PBX configuration.

Transferring to a Contact, Recent, Favorite or Buddy

1. During the active call, touch **Transfer** ➡️. The call is put on hold.

2. Select **To Contact.**

3. Select a **Contact** 👤 to view the available phone numbers. Select a number to transfer the call.

Note

Transfer to any contact/phone number by selecting the phone number the same way as placing a new call.

Note

You can also enter a contact's number using the keypad ⚏ in the title bar. In this case, touch Call to transfer the call.

4. To cancel the transfer and resume the call, select **Cancel** then ⏸️.

Note

Alternatively, touch and hold a Buddy or Contact until the checkmark displays. Drag to the active call window and verify a red outline highlights this window. Release to view a popup of options. Select **Transfer**.

Transferring to a Number Not in Your Contacts

1. During the active call, touch **Transfer** ➡️. The call is put on hold.

2. Touch the keypad ⚏ and enter the phone number. Touch **Call** to transfer the call.

3. To cancel the transfer and resume the call, select **Cancel** then ▮▮ .

Using Conference

You can use the ShoreTel Mobility Client to initiate a conference call with two other people. If you originated the conference call, you cannot transfer the call from your mobile device to your desk phone. Any of the other conference call participants using a mobile device running the ShoreTel Mobility Client can transfer the call to a desk phone.

Conferencing by Touching a Contact or Buddy

1. Place a call to the first conference member.

2. Touch the **Contact** 👤 or **Buddy** 💬 to add to this conference.

📝 **Note**

Presence must be enabled to call a buddy. Refer to "Enabling Presence" on page 27 for more information.

---

3. Touch the appropriate phone number. The original number is placed on hold and moved to your session manager. The new call is active in the launcher window.

4. Touch **Merge** 🔀 .

📝 **Note**

Alternatively, to add another conference member, touch and hold a Buddy or Contact until the checkmark displays next to the name. Drag this contact to the active call window and verify a red outline highlights this window. Release to view a popup of options. Select **Conference** to initiate the call and put the other call on hold. Touch **Merge** 🔀 to start the conference.

Conferencing by Touching a Favorite or Recent

1. Place a call to the first conference member.

2. Touch **Favorites** ⭐ or **Recents** 🕐 .

3. Touch the contact to add to this conference. The contact is automatically dialed. The original number is placed on hold and moved to your session manager. The new call is active in the launcher window.

4. Touch **Merge** 🔀 .

Conferencing by Using the Keypad

1. Place a call to the first conference member.

2. Use the keypad ▦ to call another member. The original number is placed on hold and moved to your session manager. The new call is active in the launcher window.

3. Touch **Merge** ⤲ .

Emailing a Contact

The following procedure assumes your native email settings have been previously configured for the device.

1. Touch Contacts 👤 in the tab bar.

2. Touch a contact to view details. Touch the email address. This launches the default email application used on your iPad. Refer to the application's documentation for more information.

Note

Touch the email ✉ during an active call to send an email to this person.

Note

Refer to for Buddy-specific email information

Sending Chat

While on a call, you can chat with this caller if an instant message account has been setup for both you and the caller. To send an instant message to another contact, refer to .

3. While in a call, touch **Chat** 💬 in the active window.

4. Enter text and touch **Send**.

Making Emergency Calls

To make a call to an emergency number, dial the emergency number as you normally would.

WARNING!

Emergency calls can only be placed using ShoreTel Mobility for iPad if "**Emergency Calls over VoIP**" has been enabled on the ShoreTel Mobility Router. Contact your System Administrator for more information.

If another call is active when you make a call to an emergency number, the non-emergency call is dropped.

CHAPTER
4

Presence and Instant Message

After installing the ShoreTel Mobility Application and you have enabled Presence on your device, the client interface displays your presence in the system. Presence includes your status and location, as well as the presence of others (aka "buddies") configured in the enterprise. Presence automatically updates per on your status or location.

This chapter contains the following sections:

Presence Icons

The following tables display the user's presence status and location:

Table 1: Status

Icon	Description
	Available
	Busy
	Unavailable
	Do Not Disturb
	In a Meeting
	On a Call
	Unknown

Table 2: Location

Icon	Description
	Home
	Work
	On the Road
	Custom

Enabling Presence

When Presence is enabled, you can add or delete buddies, create groups of buddies, sort buddies, and allow others to view your location and availability.

Note

When enabling presence for the first time, a popup may display asking to confirm your user name and password. This could occur if your server user name differs from your Mobility Router user name. Enter your credentials to resolve this authentication. If needed, contact your System Administrator for this information.

1. Touch the **Settings** icon.

2. Touch **Presence/IM**.

3. Verify that **Presence** is set to **On**.

4. The user name provisioned on the device can be different than the **Presence User Name**. For example, if someone borrows your device, use the **Change User** feature to enter that user's Presence information. Select **Change User** to revert back to your own user name.

5. Touch **Buddies** in the tab bar to view all buddies currently active in the network.

Setting Presence Status

Setting presence status allows buddies to view your availability.

1. Touch your Extension.

2. Touch **Status**. Select an appropriate status from the list.

Setting Location

Setting your location allows other buddies to view your location status.

Note
Location can only be set if this is the 'Primary device'. Otherwise, Location displays as disabled.

1. Touch your Extension.

2. Touch **Location**, then select a location from the popup list.

Editing the Presence Note

The presence message is an outgoing message from you that is viewed by all buddies.

Note
The presence note can only be set if this is the 'Primary device'. Otherwise, the presence note displays but is disabled.

1. Touch your Extension.

2. Touch **Note** and enter a message.

3. Touch **Save** to continue and display the new outgoing message, or **Cancel** to return to the presence window without saving changes.

Setting Do Not Disturb (DND)

Select Do Not Disturb to send calls directly to voice mail and to **Recents > Missed** without ringing the device. When Do Not Disturb is active, instant messages are sent directly to **Recents > IM**.

1. Touch your Extension.

2. Touch **Do Not Disturb**. Enable a **New DND Setting**.

Tip

For an alternative method, refer to "Call Handling" on page 61.

Viewing Buddy Details

You can view buddy information, including status, location, and contact information, in the **Details** area for each buddy.

1. Select **Buddies**.

2. Select a buddy to view the **Details** screen.

Buddy Settings

Use **Settings** ⚙ on the bottom of the Left Side Bar to sort the buddy list, select which groups of buddies display, assign notifications and log out.

Sorting the Buddy List

Use the Sort feature to change the order in which Buddies are displayed. Complete the following steps to sort Buddies:

1. Touch **Buddies**

2. Select **Settings** ⚙ on the bottom of the Left Side Bar.

3. Touch **Display Options**.

4. Use the **Buddies Sort Order** field to display buddies by **Name, Availability**, or **Location**. Use the **Groups** field to display **All buddies, Online buddies only,** or **Blocked buddies**.

Assigning a Buddy to a Group

1. Touch **Buddies**

2. Touch the 🔵 icon next to the buddy you want to assign to a group. Your buddy information displays.

3. Touch **Groups**.

4. A list of available groups displays. Select a group and touch **Save**.

Logging Out

1. Touch **Buddies**

2. Select the **Options** icon in the upper right corner.

3. Select **Logoff**. You are now logged out of the presence server.

Setting a Buddy's Access Level

Buddies can be given different access levels in your network. Define Access Levels using the following table:

Table 3: Access Level Description

Note

Depending upon the configuration of your mobile device and server, the following options might be accessed differently or displayed differently from the examples in the following sections.

MS OCS	MS Lync	Description
Personal	Friends and Family	Contacts see your published contact information, including work, home, mobile and other phone numbers.
Team	Workgroup	Contacts see your published work and mobile phone numbers. Contacts at this level may interrupt you when your status is Do Not Disturb
Company	Colleagues	Contacts see your work contact information. If you have Outlook 2003 or later and Office Communicator 2007 installed, Office Communicator can gather calendar and other Outlook related information and provide the information to Communicator Web Access for display in the contact card
Public	External Contacts	Contacts see your name, email address, title, company, and your status
Blocked	Blocked Contacts	Contacts cannot send you instant messages, and they can only see your name and e-mail address. Your status appears as offline

Complete the following steps to change a buddy's access level:

1. Touch **Buddies**

2. Select a buddy.

3. Select the **access** button in the buddy's information window.

4. Select the appropriate access type. The buddy's access level updates.

Managing Groups and Buddies

Use the Edit button at the top of the Buddies Left Side Bar to create or delete a group of buddies and add or delete buddies. When logged out of the system, the Edit button toggles as the Login button.

Adding Buddies

A contact from the corporate directory can be added to your buddy list.

> **Note**
> There are two directories: The AD directory is used for enterprise (corporate) search for phone numbers. These entities can be added as Contacts. The IM User Directory is used for IM buddies. These entries can be added as Buddies. These directories are independent of each other.

1. Touch **Buddies**

2. Touch **Edit** in the upper right corner of the Left Side Bar.

3. Touch **Add Buddies**.

4. In the **Name or Email Address** field, enter the first few characters of the buddy information as entered on the enterprise server.

5. Select **Search** to continue.

6. Select the button next to the buddy's name to display a "+".

7. Touch **Done**. A list of groups displays in the **Add to Groups** window.

8. Select a group by touching the circle to display a "+", or if only one group displays, it is automatically selected with a "+".

9. Touch **Add** to add the buddy to the group.

Deleting Buddies

Buddies can be deleted from your buddy list. This contact remains on the corporate directory server but is no longer visible on your buddy list.

1. Touch **Buddies**

2. Select the **Options** icon in the upper right corner.

3. Select **Organize Buddies**.

4. Select the bubble associated with the buddy to delete. The bubble displays an X. Select **Delete** at the bottom of the screen.

Creating a Buddy Group

You can create groups within the network. After creating a group, assign buddies to the group. Refer to "Assigning a Buddy to a Group" on page 29 for more information.

Complete the following steps to create a group:

1. Touch **Buddies**

2. Touch **Edit** in the upper right corner of the Left Side Bar.

3. Touch **Edit Groups**.

4. Touch **Edit**.

5. Touch **Add**.

6. Enter a group name.

7. Touch **Done**.

Note

If you want to add a Buddy to this Group now, proceed to step 4 of "Adding Buddies" on page 31. If you are finished creating a group without adding a buddy, touch **Cancel**.

Deleting a Buddy Group

You remove a group from your network. Complete the following steps to remove a group:

1. Touch **Buddies**

2. Touch **Edit** in the upper right corner of the Left Side Bar.

3. Touch **Edit Groups**.

4. Touch **Edit**.

5. Select the "✓" bubble next to the group name to popup the **Delete** button.

6. Touch **Delete**.

7. A popup displays with options.

- Select **Remove group only** to delete the group and place all the buddies from that group into the group "Ungrouped Contacts".

- Select **Remove group and buddies** to delete the group and all of its buddies.

8. Touch **Done** or touch **Cancel** to return to the previous screen without saving changes.

Logging In

1. Touch **Buddies** .

2. Select **Login** in the upper right corner. You are now logged in to the presence server.

Emailing a Buddy

The following procedure assumes your native email settings have been previously configured for the device.

Complete the following steps to send a buddy email:

1. Touch **Buddies**

2. Select a buddy to view details. Select an appropriate email address. This launches the default email application used on your iPad. Refer to the application's documentation for more information.

Note

Refer to "Emailing a Contact" on page 23 for Contact-specific email information.

Using Instant Message

Use the instant message (IM) feature when presence and IM are enabled in the Mobility application.

Note

Buddies with a status of "DND" or "Offline" do not receive instant messages.

> **Note**
>
> During a call, data connectivity to the presence server is required for all presence/IM actions to function. For more information on call handling during IM sessions, refer to "Making and Receiving Calls while Using Instant Message" on page 36 and "Using Instant Message While on a Call" on page 37.

> **Tip**
>
> Instant messages can be copied and pasted. Touch and hold an IM balloon to view a pop-up of copy options. Use your native device functionality to paste into the desired area.

This section describes how to use Instant Message with the ShoreTel Mobility client.

- "Instant Message Conversations" on page 34

- "Multi-Party Conversations" on page 35

- "Making and Receiving Calls while Using Instant Message" on page 36

- "Using Instant Message While on a Call" on page 37

- "Active IM Session" on page 38

- "Nonactive IM Session" on page 38

Instant Message Conversations

You can initiate or reply to an IM, as well as manage older conversations by opening and closing previous conversations, based on settings selected using "Presence/IM" on page 62.

Refer to "Adding Participants" on page 35 for information about adding another participant to a two-party conversation.

Initiating a Conversation

To initiate an IM:

Gesture	Description
Touch or	View information. Select IM.
Touch + Hold or	A check mark ✓ appears to the right of the buddy name. Drag and drop the contact onto the IM icon in the launcher.

1. Type a message to the buddy and touch **Send**.

Replying to Conversation

When an IM notification pops up in the ShoreTel Mobility Client, select **View**. A cursor flashes in the IM text field.

1. Enter text.

2. Touch **Send**.

Multi-Party Conversations

You can add more than one participant to an IM to create a multi-party conversation. You can also remove one or more participants from an existing multi-party conversation. The initiator of a multi-party conversation is the Moderator. Only the Moderator can add or remove one or more participants from a multi-party conversation.

Adding Participants

After you initiate an IM with one participant, use one of the following methods for adding another participant:

Gesture	Description
Touch + Hold or	A check mark ✓ appears to the right of the buddy name. Drag and drop the contact onto the IM icon in the launcher until the box is highlighted with a red perimeter. Release to add the participant.
Touch Options	Select **Manage Participants**. Touch the plus symbol (+) next to the participant(s) you want to add. Touch **Done** when finished.

Replying to a Multi-Party Conversation

When an IM pops up in the ShoreTel Mobility Client, select **View.** The cursor flashes in the IM text field. Enter text as described in "Replying to Conversation" on page 35. Your entries are seen by all participants in the conversation.

Removing Participants

The initiator of a conversation is the Moderator. Only the Moderator can remove participants from the conversation.

1. In an IM conversation with at least two other participants, touch **Options** [icon] **>** Manage **Participants**.

2. Touch the red "x" next to the participant you want to remove from the conversation.

Note

Each participant of a multi-party conversation closes their own conversation. If the moderator closes their conversation, only the moderator's view is closed. The other participants are still active and can continue their conversation until they each discontinue/close the conversation.

Initiating a Second Conversation

You can initiate a new IM conversation while another conversation is in process. The first IM conversation moves to the session manager while the second conversation is taking place. Alternate between the two IM conversations by touching the appropriate session in the session manager.

Gesture	Description
Touch [icon] or [icon]	View information. Select IM.
Touch + Hold [icon] or [icon]	A check mark ✓ appears to the right of the buddy name. Drag and drop the contact onto the IM icon in the launcher.

Making and Receiving Calls while Using Instant Message

You can make or receive a call during an Instant Message session.

Making a Call During an IM Session

You can make or receive a call during an Instant Message.

1. To call the participant of the IM conversation, touch [icon].

2. To call another person, use either of the following methods:

Note

Once minimized, the original IM is moved to the Session Manager. Touch the IM to continue this conversation. You may continue to send IMs as well as correspond with your caller.

Gesture	Description
Touch or	View information. Select the appropriate number to call.
Touch + Hold or	Touch the **Options** button. Select **Minimize**. Touch + Hold a or . A check mark ✓ appears to the right of the buddy name. Drag and drop the contact onto the icon in the launcher.

Note

Once minimized, the original IM is moved to the Session Manager. Touch the IM to continue this conversation. You may continue to send IMs as well as correspond with your caller.

Note

At least one of the buddy's numbers — enterprise, home, etc., must be configured on the sever for you to be able to call the buddy. If the buddy does not have any numbers configured on the server, the option to call the buddy is not available.

Receiving a Call During an IM Session

During an IM session, an incoming call displays in the main window. Answer or decline the call as appropriate.

Using Instant Message While on a Call

You can send and receive IMs during a call using the same actions as a standard IM session. The caller is not put on hold.

Respond to an IM While on a call

1. While in a call, a pop-up displays the IM.

2. Touch **Close** or **View**.

Note

Check **Settings** ⚙ **> Presence/IM > New IM Notifications** to verify this setting is enabled.

> **Note**
>
> If a previous conversation with this participant is still active in the Session Manager, a badge displays an alert with the number of IMs the participant has sent

Initiate an IM while on a Call

1. While in a call, touch a buddy, contact, favorite or Recents.

2. Verify the contact information tab is selected, select the information tab if it not active.

3. Select **IM**.

Initiate an IM to the Same Caller

While in a call, you can chat with this caller if Presence and IM are enabled.

4. Touch **Chat** in the in-call window.

5. Send/receive IM conversations as normal.

Active IM Session

Several options are available during an active IM conversation:

- Touch the conversation in the Session Manager to activate and continue an IM.

- When the conversation is active, touch the **Options** button to view the following options:

  - Touch **Manage Participants** to view a list of the current conversation participants. A "+" indicates which participants are active.

    - Tap a participant to add someone to the conversation, then tap **Chat** to send the invitation to the new participant.

    - Tap an active participant to delete/remove someone from the conversation.

  - Touch **Email Transcript** to send an email copy of the conversation via the mobile device's native email application.

  - Select **Close conversation** to discontinue this conversation. This conversation moves to the **Recents** area and can be viewed by touching the conversation again.

  - Select **Minimize** to move the active session to the Session Manager.

Nonactive IM Session

There are two options available for a nonactive IM conversation:

1. Touch **Recents** 🕐 in the tab bar.

2. Touch **IM**.

- Swipe a previous conversation to view a **Delete** button. Touch **Delete** to permanently remove this conversation from the **Recents** window.

- Touch a previous conversation to view history of the conversation.

  - Touch **Email Transcript** to send an email copy of the conversation via the mobile device's native email application.

  - Select **Close conversation** to return the conversation to the Recents area. This conversation can be viewed by touching the conversation again.

Today

The Today screen displays a list of calendar meetings and conferences. A "Join" button displays associated with the ShoreTel Conferencing application, allowing you to automatically join ShoreTel conferences with your device. Refer to for setup information.

Note

You may need to consult with your I.T. department to verify ShoreTel Conferencing compatibility.

This chapter contains the following sections:

-

-

-

-

Display Meeting or Appointment Information

The **Today** screen in the Left Side Bar displays a list of meetings and conferences associated with the active calendar on your mobile device. Typically, this calendar is synced with your enterprise email account.

> **Note**
>
> Touch **Now** to bring the meeting list to the current day.

1. From the ShoreTel Mobility options menu, touch **Today** in the Tab Bar to see a list of your next appointments.

2. Touch an appointment to view the details.

Join an Audio Conference

Listen to a meeting by joining a conference in your calendar.

1. From the ShoreTel Mobility options menu, touch **Today** in the Tab Bar to see a list of your next meetings.

2. Touch **Join** to automatically place a call into the conference. This is an audio call only, and no further actions are required.

Join a Web Conference

To join a web conference:

1. From the ShoreTel Mobility options menu, touch **Today** in the Tab Bar to see a list of your next meetings.

2. Touch the meeting invitation (not the **Join** button). The meeting details display.

3. Touch **Join Web Conference** to connect to the conference. The conference passcode is automatically entered. The conference screen displays on your device.

Dialing From an Email Message

You can also dial calls from selecting links in email message. Refer to "URL-Based Dialing" on page 66 for information on manually entering the pertinent information for dialing in, or for one-touch dialing from the URL in the email.

CHAPTER

6

Secure Remote Access

Secure remote access allows you to use the following features:

■ If the ShoreTel Mobility is licensed for Secure Remote Voice, you can use this feature to securely place and receive calls using any Wi-Fi network or VoIP over cellular data network outside of the enterprise. Secure Remote Voice uses Secure Sockets Layer (SSL) to ensure that your calls are secure. You can use Secure Remote Voice from home or any other Wi-Fi hotspot and have access to PBX and desk-phone features, just as you do when you are in the enterprise.

■ Secure enterprise services, such as directory query are accessed using a Wi-Fi network that is not in the enterprise network.

Depending on how your system administrator configured your account, you might have access to Secure Remote Voice or secure enterprise services or both. Contact your system administrator if you are not sure whether you have secure remote access enabled on your account.

This chapter contains the following sections:

■

■

Before You Begin

Perform the following tasks before using Secure Remote Voice and Secure Enterprise Services:

1. Connect to a the Mobility Server via an external Wi-Fi network or cellular data connection. Refer to for details.

2. Verify that Voice and Data Services are accessible with your ShoreTel Mobility user account. Refer to "Verifying the Connection" on page 55.

If you are using a Wi-Fi from a hotspot or similar network, you might need to access a public Web page after creating a Wi-Fi access point on your mobile device so that you can enable access to the Internet. After you have established Internet connectivity, you can then add the access point as a preferred connection in the ShoreTel Mobility Client.

Note

Before you prepare to use Secure Remote Voice or access secure enterprise services, verify that your ShoreTel Mobility user account is configured to use these features. If you are not sure whether you are authorized to use these features, contact your system administrator.

Verifying the Connection

Touch the VoIP registration   or data   icon to display the connection status.

- Green indicates connection.

- Red indicates no connection.
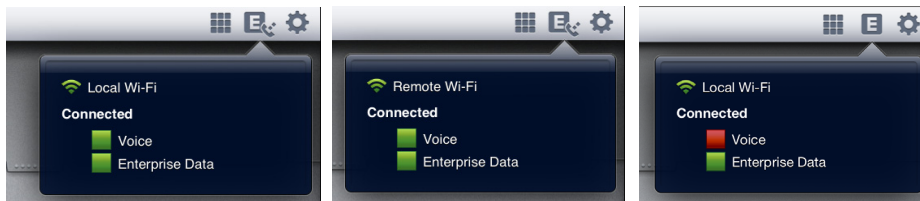
No connection displays as follows. Touch the icon to display information:
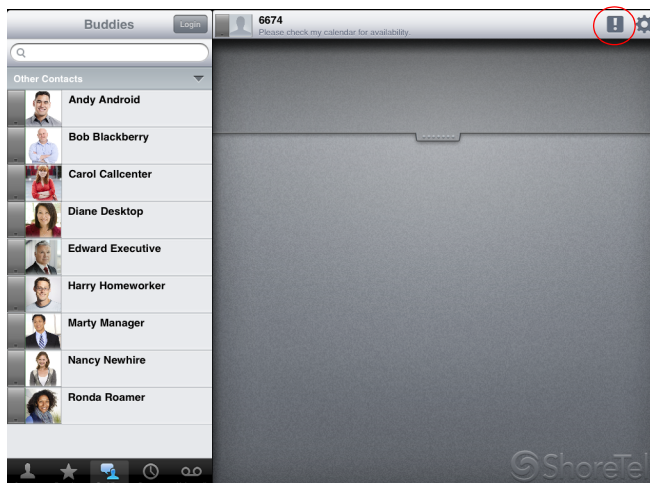
CHAPTER

7

Searching People, Places and Things

If your company uses an LDAP-based corporate directory server and your System Administrator has configured the ShoreTel Mobility Router to query that directory server, the ShoreTel Mobility application allows you to search the corporate directory from your mobile device when it is connected to the enterprise Wi-Fi network. You can search for a person, email address, phone extension or full number, conference room, or other corporate entities.

If you are outside the enterprise Wi-Fi network, you can search the corporate directory only if your system administrator has configured your ShoreTel Mobility user account to access enterprise services using a remote Wi-Fi network or data network. Searching the corporate directory using a remote Wi-Fi data network is a secure transaction.

This chapter contains the following sections:

Searching the Directory

If you have access to secure enterprise services, you can also search the corporate directory using a remote Wi-Fi or data network.

To search the corporate directory for a person, a phone number, a conference room or other corporate entity, touch **Contacts** 👤 in the tab bar, then enter a string of letters or numbers that you want to search for in the field. Touch **Continue Search on Enterprise Directory** or touch **Search** on the keypad.

> **Note**
>
> All names that match the search criteria display. For example, entering "joe" displays all users with first name or last name that start with this string; searching "2814" displays all users with that extension and their full directory numbers (555-2814, 888-2814, etc.) as they appear in the corporate directory.

If your directory search provides a match, any associated information that in the corporate directory displays (for example, home number or personal cell number). The following includes but is not limited to possible listed information:

- enterprise

- home

- work (email)

- Text Message

- Share Contact (email)

The contact information that is listed depends on the information that is in the corporate directory. For example, if there is no home phone number listed in the corporate directory, no home phone number is shown in the list of additional contact information.

> **Note**
>
> Depending on the server configuration, if a large number of contacts match the search, not all matches may be shown.

Searching the Directory Outside of the Enterprise

If your system administrator has configured your ShoreTel Mobility account to use secure enterprise services, you can use the following networks to search the corporate directory when outside of the office:

- Cellular packet-data network

  Use the data network of your cellular service provider to access the corporate directory. The network depends on your service provider and the networks your mobile device supports. If you search the corporate directory using a cellular data network, you incur data charges as described in your service plan.

- Wi-Fi network outside of the enterprise

If you can establish a connection to a Wi-Fi network with your mobile device, you can search the corporate directory.

If you are not sure whether you have access to the corporate directory outside of the office, contact your system administrator.

For information about how to set up your mobile device to access secure enterprise services, see "Secure Remote Access" on page 54.

Adding a Contact

1. Touch **Contacts** 👤 in the tab bar, then enter a string of letters or numbers that you want to search for in the field.

2. Touch **Continue Search on Enterprise Directory** or touch **Search** on the keypad.

3. Select a contact.

4. Select **Add to Contacts** in the popup window.

5. Select **Create new Contact** or **Add to Existing Contact** as appropriate.

6. Modify fields as appropriate.

7. Touch **Done**.

8. Touch the "X" in the search field to return to the main screen.

Creating a Favorite

1. Touch **Favorites** ⭐

2. Touch the **+** at the top right of the **Favorites** window to add a contact to the list.

3. Select a contact or use the search field to lookup an existing contact. Specify the contact's information, for example work phone, email, etc., to add to the **Favorites** list.

> **Note**
>
> This action may be used for all of a single contact's information, displaying a new Favorite listing for each item that is selected. For example, if you select both email and work phone number as favorites for a single contact, that contact displays twice in the Favorites list, one showing the email address and the other showing the work phone number.

> **Tip**
>
> You can also add a phone number/IM for an existing contact to the Favorites list by touching the ⭐
> for the phone number/IM when viewing the contact.

Deleting a Favorite

1. Touch **Favorites** ⭐

2. Swipe across a favorite's name. A **Delete** button displays. Select the button to delete the favorite, or touch anywhere else to cancel this action without deleting.

> **Tip**
>
> You can also remove a phone number/IM from Favorites by touching and removing (unhighlighting)
> the ⭐ for the phone number/IM.

CHAPTER
8

ShoreTel Mobility Settings

Use the **Settings** feature to view or modify ShoreTel Mobility Settings. This chapter contains the following sections:

Preferences

Call Handling

- Touch **Do Not Disturb.** Select the length of time for DND to be active.

  To revert to allowing incoming calls to ring the device, select **Off**.

  - **On**—Enabled. Your desk phone rings for all incoming calls and the mobile device does not ring.

  - **Off**—Disabled. Your mobile device rings.

> ✎ **Note**
>
> As an alternative, refer to "Setting Do Not Disturb (DND)" on page 28.

- **Select Forward call to voicemail** to send all incoming calls to voicemail. Incoming calls to your enterprise phone number do not ring on your desk phone or mobile device.

- **Select Forward call to** specifies that all calls are forwarded to a specific phone number. Select **On**, then enter the number in the field.

- Select **Transfer to desk number** to transfer calls to your desk phone. By default, the extension of your enterprise phone number is used when transferring an active call from your mobile device to your desk phone.

  If the PBX for your enterprise uses a phone number other than your extension to transfer active calls to your desk phone, you can specify that number. If you need more information about which number your PBX uses to transfer calls, contact your system administrator.

Data and Call Routing

1. In the **Allowed Data Networks** area, choose from the following options:

   - **Wi-Fi**—When enabled, Wi-Fi networks are used to connect to the ShoreTel Mobility Server whenever possible. When disabled, the ShoreTel Mobility application does not use Wi-Fi networks. This option may be disabled if the your account has not been enabled for cellular data access on the ShoreTel Mobility Router.

   - **Cellular Data**—When enabled, voice calls can be made using a cellular data connection. This option may be disabled if the your account has not been enabled for cellular data access on the ShoreTel Mobility Router.

2. In the **Call Routing Preferences** area, the following options are available:

   - **Wi-Fi**—When enabled, Wi-Fi networks are used for voice calls when possible. If disabled, Wi-Fi networks are not used for voice calls.

   - **Cellular Data**—When enabled, voice calls can be made using a cellular data connection. Voice calls over cellular data require a 3G or faster data connection.

- **Cellular Voice**—When enabled, enterprise calls will be placed as cellular voice calls when no data connections can be used. The enterprise call is still connected via the ShoreTel Mobility Router.

- Disable this option to prevent cellular voice calls from being used for enterprise calls. This option is only available if your account has been enabled for cellular voice calls on the ShoreTel Mobility Router.

Presence/IM

- The user name provisioned on the device can be different than the **Presence User Name**. For example, if someone borrows your device, use the **Change User** feature to enter that user's Presence information. Select **Change User** to revert back to your own user name.

- Touch **IM History**. Select the appropriate option for the amount of history you want to display.

- Toggle **New IM Notifications**, **On/Off**.

- Toggle **New IM Notifications Sound, On/Off**. Toggle **ON** if you want to be alerted about new IMs with a sound.

- Toggle **Message Preview** to **On** to view a preview window of the IM.

Voicemail

Enter the enterprise and/or carrier numbers used to contact voicemail.

Calendar

After ShoreTel Mobility Client is installed, you are prompted to allow the client permission to access your calendar. Allowing access gives you direct access to meeting invitations (ShoreTel Conference Bridge or WebEx only) or to pop-up event reminders.

If you did not opt to allow the client to access your calendar, you can manually set it as follows:

1. Set **Calendar Conference** to **ON**.

2. Set **Reminder** to **On**, and then select a how many minutes ahead of the meeting you want a pop-up reminder.

Advanced

Configuration

Touch **Configuration** to view read-only information about your client and the Mobility application.

> **Note**
>
> These settings can only be changed by re-provisioning the device. Refer to "Provisioning" on page 64. for more information.

Communicator

> **Note**
>
> This feature is available only with ShoreTel IP-PBX.

> **Note**
>
> In most cases, your ShoreTel Communicator and Presence server's user name and password are the same, enabling Communicator to automatically log on.

ShoreTel Communicator is typically automatically enabled when the device is provisioned. If credentials cannot be determined automatically when the application launches the first time, a popup prompts you for Username and Password.

- Toggle **Enable** to **On**.

- Enter the Communicator **User Name**.

> **Note**
>
> If the password cannot be determined automatically, the user will be prompted for credentials when needed. The User Name field can also be left blank. The application attempts to automatically determine the credentials, and prompt the user if that fails.

> **Note**
>
> The login displays **Remember password**. Check the box to save the password without needing to enter it again (unless it changes). If not checked, the password is remembered while the application is running, but you are prompted again if the application is restarted.

> **Note**
>
> If the username is changed in the Settings screen, any previously saved password is cleared. You are prompted for this information at the next login.

> **Note**
>
> If an Active Directory account is used, the user name must contain the Windows Domain, followed by a backslash character and the login name, e.g. 'DOMAIN\user'.

Setup

- Verify or change the **Enterprise Voice mail Number**. This is the number you dial to access your enterprise voice mailbox. Contact your System Administrator for this information.

- Touch **Echo Cancellation** and specify **On** (enabled) or **Off** (disabled). The default is **On** and is the recommended setting.

- Touch **Keep WiFi Connected** and specify **On** (enabled) or **Off** (disabled). ShoreTel recommends enabling this option to ensure calls are received on the Wi-Fi network when the device has been idle for a long period of time.

- Select **Synchronize Configuration** to retrieve recent settings changes from the ShoreTel Mobility Router. Settings from the Mobility Router are automatically retrieved at regular intervals. Use this function to immediately retrieve the latest settings, without waiting for the automatic synchronization to occur. A Wi-Fi or cell data connection is required.

Provisioning

> **Note**
>
> Make sure that the device is connected to a Wi-Fi or data network prior to proceeding.

Touch **Provisioning** to reprovision your device. Follow the procedure starting from step 5 in "Download and Install the ShoreTel Mobility Client Application" on page 3 to complete the process.

Troubleshooting

Select **Troubleshooting** to view logging options. Your mobile device can collect logs while making and receiving calls. If a problem occurs, you can upload the logs, along with a short description of the problem, to the Mobility Router for evaluation.

> **Note**
>
> A Wi-Fi or cell-data connection is required for this feature.

- On the **Debug Options** screen, turn **Enable Logging ON**.

- Enable the appropriate type of logging.

- Touch **Log Levels** to select the severity of the log.

- Touch **Components** to specify which component of the log to report. A checkmark indicates that component will be included in the log.

- To send the log:

    - Select **Upload** and optionally enter a brief description of the nature of the error in the **Subject** field, and touch **Send**, or

    - Select **Send log via email**, complete the email form, and touch **Send**.

- Select **Primary Device** to change the setting to **Yes** and to make this your primary device.

> **Note**
>
> You can provision up to 5 devices (per account) based how your ShoreTel Mobility Router is configured. Check with your ShoreTel Mobility administrator if you encounter a conflict. The Primary Device is how your location is determined, so it should be the device you carry all the time. You can use all of your devices to make or receive calls, instant messages, and more.

Help

Tutorial Videos

Select to view tutorials on various features of the ShoreTel Mobility application.

About

Touch **About** to view release version and date information.

APPENDIX

A

URL-Based Dialing

Overview

Use the URL-based dialing feature to join conferences or dial extension digits to an automated attendant. The URL is provided in a conference meeting invitation. This feature is supported using the following syntax.

Table 1: URL-based dialing

Key	Description
; w	Wait/Prompt
, p	Work

The feature is available under the following conditions:

- Connected to a corporate/enterprise Wi-Fi network.

- Connected via the cellular data network.

Supported Formats and Example Uses

The following table shows supported formats and example uses for this feature:

Table A-1. Example Uses

Description
VoIP url with **,** and **;** characters sent in an email where the email format is plain-text format Example Syntax: `voip://2113,#;1234567#`
VoIP URL sent in a calendar INVITE from the OUTLOOK Exchange client on **MS Windows 2010** (new meeting). The Client opens the calendar appointment and the user can click the VoIP URL that is included in the NOTES section of the invitation.
VoIP URL sent in a calendar INVITE from the OUTLOOK Exchange on **MS Windows 2010 through ShoreTel Service Appliance 100 Outlook Plug-in** (for example, manually adding a VoIP URL as part of the ShoreTel Service Appliance 100 details in the invite).

Table 2: Supported formats

Format	Supported
Plain Text Email	✓
HTML Based Email	✓
Hypertext link within an Email	-
Microsoft® Outlook Calendar Invite	✓

Table 3: Example Uses

Description
VoIP url with **,** and **;** characters sent in an email where the email format is plain-text format Example Syntax: `voip://2113,#;1234567#`
VoIP URL sent in a calendar INVITE from the OUTLOOK Exchange client on **MS Windows 2010** (new meeting). The Client opens the calendar appointment and the user can click the VoIP URL that is included in the NOTES section of the invitation.
VoIP URL sent in a calendar INVITE from the OUTLOOK Exchange on **MS Windows 2010 through ShoreTel Service Appliance 100 Outlook Plug-in** (for example, manually adding a VoIP URL as part of the ShoreTel Service Appliance 100 details in the invite).
VoIP URL sent in a calendar INVITE from the OUTLOOK Exchange on **MS Windows 2010 through ShoreTel Service Appliance 100 Outlook Plug-in** (for example, manually adding a VoIP URL as part of the ShoreTel Service Appliance 100 details in the invite).

URL-based One-Touch Calling

To call in via the URL in your email message:

1. When you receive an email reminder message or calendar invitation with a call link:

2. Select the link to see meeting details.

3. Wait for the meeting pop-up to open before the meeting time, then select the link in the pop-up to see more details.

The following is a sample of an email invitation with the extension, VoIP URL, and participant code highlighted:

ShoreTel UCB Conference
January 25, 2012 14:37

~~~~~~~~~~~~~~~~~~

```
A  ShoreTel  conference  call  has
been  created  for  this  conference.
Use  either  of  the  following  to
join the call:
Call          x2113 (Extension)          ◄──── sample extension
and  enter  the  access  code  below
followed by # key.
Participant code: 1234567          ◄──── sample participant code

voip://2113,1234567#          ◄──── sample link
```

APPENDIX

B

Extension Assignment and Call Handling Mode

Overview

ShoreTel Mobility supports the following ShoreTel Communicator features.

Note

The following features are available only when ShoreTel Communicator is enabled. Refer to "Communicator" on page 63 to enable these features.

Table 1: ShoreTel Communicator Functions

Function	Icon	Description
Extension Assignment		Provides a list of phone numbers that can be used as an alternate to a desk phone for incoming calls. Refer to "Configuring Extension Assignment" on page 71.
Visual Voice Mail		Displays the number of voice mail messages in the voice mailbox and information such as date, time and duration, and allows you to listen to voice mail messages. Refer to "Use Visual Voice Mail" on page 19.
Call Handling Mode		Changes the call handling mode on the ShoreTel Mobility client. Refer to "Specifying Call Handling Mode" on page 72.

Configuring Extension Assignment

The active Extension Assignment (EA) is an alternate phone number you can use to answer calls coming into the ShoreTel extension. For example, set EA as your home phone number to have all incoming calls to the ShoreTel extension routed to your home phone. When the EA is set to something other than your desk phone, the desk phone displays "Anonymous" on the screen. Calls placed from the desk phone in this state show "Caller ID unknown" on the called party's display, since it is no longer assigned to you.

The default is Primary Phone (desk phone).

Note

Define EA numbers in ShoreTel Communicator. Refer to your device-specific ShoreTel Communicator User Guide for more information.

Note

All additional EAs defined in ShoreTel Communicator display on the ShoreTel Mobility Client. Set EA in the ShoreTel Mobility Client selects/enables the active EA.

WARNING!

If running ShoreTel Mobility on your cell phone, do not select your cell phone number as the Extension Assignment. Doing so will cause ShoreTel Mobility to be bypassed.

To select an Extension Assignment:

1. Select your Extension then touch

2. Select **Primary Phone** to have incoming calls routed to your primary phone (in most cases, a desk phone). Select another EA in the list to have incoming calls routed to that phone number. In this case, the primary phone becomes "Anonymous".

Specifying Call Handling Mode

The active Call Handling Mode determines the handling of inbound calls. One mode is always active.

Note

Configure the Custom Call Handling Mode using the Configure Call Handling... option in ShoreTel Communicator. This configuration is mirrored in the ShoreTel Mobility Client when Custom is selected. Refer to the ShoreTel Communicator for Mobile User Guide for more information on configuring Custom Call Handling Mode.

To specify the current Call Handling Mode:

1. Select your Extension then touch

2. Select the desired mode from the list of options. The check mark defines the current Call Handling Mode.