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ShoreTel Mobility User's Guide for Nokia®

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Before You Start

About This Book

This guide is for people who use Nokia phones with the ShoreTel Mobility Solution. You should have a basic understanding of the native system features and functionality of your device so that you can use this guide effectively.

The procedures in this guide may vary slightly depending on your device.

Conventions

This guide uses the following advisory notices:



WARNING!

Pay special attention to this information.



Note

This information is extra, or supplementary.



Tip

This information may be helpful to you.

This guide uses the following text conventions:

Marking	Meaning
Bold text	Objects, such as buttons and menus, that you select on your mobile device or computer.
Command text	Text examples that you need to type.
<i>Italic text</i>	Document titles or words with special emphasis.
Menu > Command	A menu item that you select.

Related Documentation

The ShoreTel Mobility solution suite includes the following other documents:

- *ShoreTel Mobility Platform Support Guide*
- *ShoreTel Mobility Router Administrator's Guide*
- *ShoreTel Mobility Router 6000 Hardware Installation Guide*
- *ShoreTel Mobility Router 4000 Hardware Installation Guide*
- *ShoreTel Mobility Router 2000 Hardware Installation Guide*
- *ShoreTel Mobility Quick Reference Card: Features*
- *ShoreTel Mobility Quick Reference Card: Installation*

Online Knowledgebase

The ShoreTel online knowledge base provides more information about the current release or to resolve issues with the ShoreTel system. This password-protected, online database is available for authorized users through the ShoreTel support site at <http://support.shoretel.com>.

CHAPTER

1

Installing the ShoreTel Mobility Client Application

After you install the ShoreTel Mobility Client application, use it as your dialer screen instead of your phone's dialer. With the ShoreTel Mobility Client, you can make and receive calls; view your call history; open Contacts; use Bluetooth and speed dialing; and also use enterprise telephony features, such as conferencing or forwarding or enterprise directory lookup of contacts.

Use this chapter to install the ShoreTel Mobility Client, as follows:

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WARNING!

You can install the ShoreTel Mobility Client directly to your *mobile device's memory only*, not on a micro SD or other memory card.

Before You Begin

Before you install the ShoreTel Mobility Client, you may need the following items and information:

- Data connection— Wi-Fi or cellular data. See [Verifying Access Point Setup on Your Mobile Device on page 12](#) for more information.
 - Wi-Fi access point credentials—if setting up a Wi-Fi access point on your mobile device, any applicable name or password, as well as the security mode (for example, WPA or WPA2).
 - ShoreTel Mobility Router IP address: the IP address on the enterprise network and, if applicable the public address, or fully qualified domain name (FQDN).
 - User name and password—user name and password required for authentication with the Mobility Router.
 - Enterprise phone number or extension: contact your system administrator if you have questions about the information that you need for installation.
 - SIM card—a working SIM card inserted in the mobile device (for GSM devices only).
 - Settings—time, date, and time zone set on the device before you provision the client.
1. Download the correct version of the ShoreTel Mobility Client to your device, as follows:
 - If you see your mobile device on the screen, touch the version number link.
 - If you do not see your mobile device on the screen, touch the link on the screen below the table.



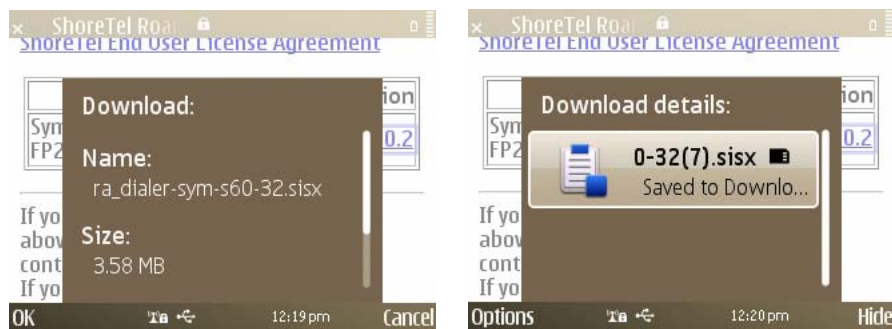
Mobile OS	Version
Symbian Series 60 3rd edition FP2	4.6.10.2

If your device's Mobile OS is listed above, click the version number to continue.

If your device's Mobile OS is not listed, click [here](#) to see the images for all supported Mobile OSs.

Options 12:12 pm Back

2. Select **OK**. The image is downloaded to the native downloads directory on your mobile device. Select **Options**.

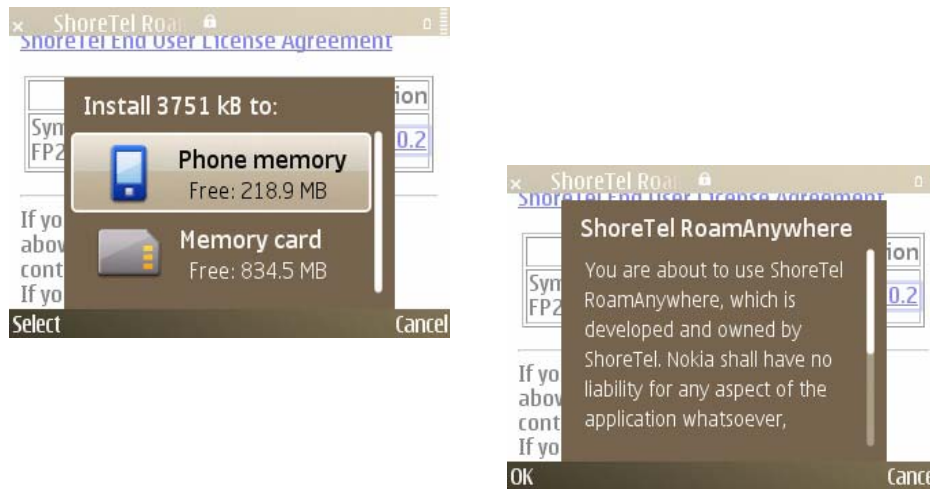


3. Verify the ShoreTel application is selected and choose **Open**.



4. Select **Yes** to confirm the installation.
5. Verify the name of the application and select **Continue**.

Choose **Phone memory** and choose **Select**. Read the disclaimer and select **OK**. The installation may take several minutes. Your device reboots and starts the ShoreTel Mobility Client. Read the disclaimer



and press **OK**. Press **OK** again to begin provisioning the ShoreTel Mobility Client.



Note

The ShoreTel Mobility Client supports provisioning the device in multiple languages, including English, French, and Dutch. To change languages, from the Home menu select **Settings > General > Personalization > Languages > Language for Telephone**, and then select the language you want. Select **Yes** to reboot.



Note

On Nokia, you must provision any Wi-Fi networks intended for Restricted mode users before installing the Client, including home or non-enterprise Wi-Fi networks for use with Secure Remote Voice.

Verifying Access Point Setup on Your Mobile Device

Complete the following steps to verify that a Wi-Fi access point in your enterprise network is set up on your mobile device:

1. Navigate to the **Access Points** area of your device.
2. Verify that at least one Wi-Fi access point in your enterprise network is in the list of access points.
3. If you do not know the name of a Wi-Fi access point in your enterprise network, contact your system administrator.
4. If you do not see any access points in your enterprise network listed, set up an access point on your mobile device. For more information, see [Connecting to a Wi-Fi Network on page 13](#).

Connecting to a Wi-Fi Network

If you do not have a Wi-Fi access point already set up on your mobile device, set up at least one enterprise Wi-Fi access point before installing the ShoreTel Mobility Client.

Before setting up a Wi-Fi access point on your mobile device, make sure that you have the following information:

- Name of a Wi-Fi access point in your enterprise network
- Credentials for the Wi-Fi access point (used for authentication with the access point)
- Security mode used by the Wi-Fi access point (for example, WPA or WPA2)

To set up a Wi-Fi access point on your mobile device, follow the steps below. For more information about setting up a Wi-Fi access point, refer to the documentation for your mobile device.

- Complete the following steps to set up a Wi-Fi access point on your mobile device:
 1. Navigate to the **Access Points** area of your device.



Note

These steps may vary depending on your mobile device.

2. Select **Options > New Access Point**. The Access points screen appears.
3. Select **Yes**.
4. Select the **New Access Point**. The new access point is added.



5. Select the access point, **Options > Edit**.



6. Scroll to the Network Status field, and select one of the following options:
 - **Hidden**—Hides the network name when searching for access points, which means that you need to know the name of the WLAN to which you want to connect.
 - **Public**—Displays the network name when searching for access points.
7. Scroll to the **WLAN network mode** field and verify **Infrastructure** is selected.
8. Scroll to the **WLAN security mode** field and select or verify the security mode that your Wi-Fi network uses.
9. The security settings fields that appear depend on the security mode of the enterprise Wi-Fi network, as follows:
 - If you are using a pre-shared key, enter the key in this screen.
 - If you are using an Extensible Authentication Protocol (EAP) plug-in, select the EAP plug-in settings menu to enable and configure an appropriate plug-in. Refer to your enterprise settings for more configuration information.
10. Select **Back** until you return to the Menu screen.
11. Verify that the access point settings are correct by starting a Web browser to access a Web site.
12. When prompted, select the access point that you set up. If the page does not display correctly, check the access point settings.

Downloading and Installing the ShoreTel Mobility Client Application



Note

Before downloading and installing the ShoreTel Mobility Client, make sure that the battery in the mobile device is at least 60% charged and that the device is in an area with good enterprise Wi-Fi coverage.

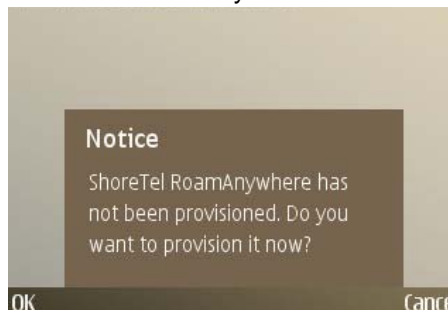
Complete the following steps to download and install the ShoreTel Mobility Client from the Mobility Router:

1. On the mobile device, start a Web browser and enter the URL of the Mobility Router in the following format:

`http://Mobility-Router-address/i`

where *Mobility-Router-address* is the IP address or fully qualified domain name of the Mobility Router (for example, `http://10.11.12.13/i` or `http://sj.example.com/i`).

2. If you are not accessing the Mobility Router as a local user, contact your system administrator for alternative ways to access and download the ShoreTel Mobility.



3. Read the **Emergency Call Warning** message and select **OK**. If you do not accept the Emergency Call Warning, the ShoreTel Mobility Client exits without provisioning.



Note

Depending on how your device is pre-configured, some of the provisioning screens may not appear.

4. Read the message about the percentage of charge the device battery must have, and select **OK** to provision the device.



Note

The ShoreTel Mobility Client must be provisioned to be fully functional on the device.

5. Enter the following information:
 - **Mobility Router Address:** Type the IP address or fully qualified domain name (FQDN) of the ShoreTel Mobility Router on the enterprise network. An example of an IP address is 10.1.2.3, and an example of an FQDN is server1.example.com.
 - **Username:** This username is typically the one you use to log in to your enterprise network. If your system administrator has created a local user account for you on the Mobility Router, use that username.

If you are a system administrator provisioning for an end-user, select **Option > Admin Provisioning**. This mode allows you to enter administrator credentials. The administrator must be listed as having administrator capabilities on the Mobility Router. Administrator credentials are

defined on the **Configuration > System > Authentication > Local Users** page on the Mobility Router. To return to User Provisioning mode on the mobile device, press **Options > User Provisioning**.

- **User Password**; Enter the appropriate password. If you entered your enterprise username, enter the password you use to log in to the enterprise network. If you entered a local username, enter the local password. Contact the system administrator for the password for the local user account.
 - **Remote Provisioning**; If you are provisioning locally, confirm that **Remote Provisioning** is set to **No** and select **Next**. If you are provisioning remotely, set **Remote Provisioning** to **Yes**, select **Next**, and then enter the **Remote Access Server Address** and **Remote Access Server Port**.
 - **Mobile Number**; Verify that the number listed is the cellular phone number for your mobile device. This field must contain all numbers and no special characters (for example, 4085551515). **Mobile Number** does not need to include the country code.
 - **Enterprise Full Number**; Type the 10-digit enterprise number.
 - **Enterprise Extension**; This extension is typically the internal extension of your enterprise phone number. **Enterprise Extension** must contain at least four digits and no special characters, for example 4442.
6. Select **Yes** to automatically start the ShoreTel Mobility Client.

After the mobile device restarts, you might be prompted to enter the phone number you use to access cellular voice mail.

You can change the preferred connection or add other wireless networks as preferred connections.

For more information, see [Changing Network Preferences on page 62](#).

Disconnecting from the Enterprise Wi-Fi Network

To disconnect your device from the enterprise Wi-Fi network, make sure the ShoreTel Mobility Client is running and select **Options > Disconnect Wi-Fi**. Disconnecting from the Wi-Fi network allows you to place and receive calls using the cellular network.

Connecting to the Enterprise Wi-Fi Network

To connect to the enterprise Wi-Fi network, start the ShoreTel Mobility Client and select **Options > Connect to Wi-Fi**.

The VoIP registration icon appears when the device is connected to the enterprise Wi-Fi network. When you are connected to the enterprise Wi-Fi network, you can place and receive calls using VoIP.

Reprovisioning

If you have the ShoreTel Mobility Client running on a device and you see a prompt that it requires provisioning or that it is “Not Provisioned,” reprovision it as follows:

1. Connect to a Wi-Fi network or if your ShoreTel Mobility user account is configured to access Secure Enterprise Services using cellular data, you can provision while connected to a cellular data network.
2. **Options > Reprovision**, and then follow the initial installation procedure.

Updating to the Latest ShoreTel Mobility Client

Use one of these methods to update the ShoreTel Mobility Client:

- **Automatically on restart:** If your mobile device is connected to the enterprise Wi-Fi network or registered to use Secure Enterprise Services, when you restart the ShoreTel Mobility Client, it automatically checks for any software updates on the Mobility Router.
- **Periodically while connected:** While connected to the network, the client periodically checks for updates.
- **Manually:** Check for updates by selecting **Options > Check for updates**.

A popup alerts you if there is a software update available for the ShoreTel Mobility Client available. If you dismiss an update popup, the message will not appear again until you restart the ShoreTel Mobility Client.



Note

The update may be optional depending on your version of the ShoreTel Mobility Client. If the update is required, and you select **Cancel**, the ShoreTel Mobility Client exits. Every time you start the ShoreTel Mobility Client, you are prompted to upgrade. You cannot use the ShoreTel Mobility Client until you upgrade.

To get ShoreTel Mobility Client updates:

- If the update is required, select **OK** to update to the latest software.
- If the prompt indicates that the update is recommended or asks whether you want to update, select **Yes** to update to the latest software or **No** to continue using the current version.

The ShoreTel Mobility Client is now installed on your mobile device, and a preferred access point has been configured for the ShoreTel Mobility Client. If you choose to have the ShoreTel Mobility Client start after installation, the ShoreTel Mobility Client runs in the background.

Uninstalling the ShoreTel Mobility Client

You can uninstall the ShoreTel Mobility Client as follows:

1. Navigate to your mobile device's Applications.
2. Press the **Menu** key.
3. Use the scroll key to navigate to the Applications, Installations, or Installat. icon, and select it.



Note

The icon you select depends on your mobile device model.

4. Scroll to **RAClient**.
5. Select **Options > Remove**.
6. Select **Yes** to confirm and remove the client.

You may need to restart your mobile device.

CHAPTER

2

Getting Started

Use this chapter to familiarize yourself with some of the basics of how the ShoreTel Mobility Client is integrated with your mobile device, including the following topics:

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Using The Mobility Client in Multiple Countries.....	23
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Starting and Accessing The Mobility Client

If you do not immediately start the Mobility Client after installation, you can start it, as follows:

- From your mobile device's home screen, select **Menu > Options > Show open apps** and select the Mobility Client, or
- From the native home screen, select **Menu > Applications**, and select the Mobility client.



Note

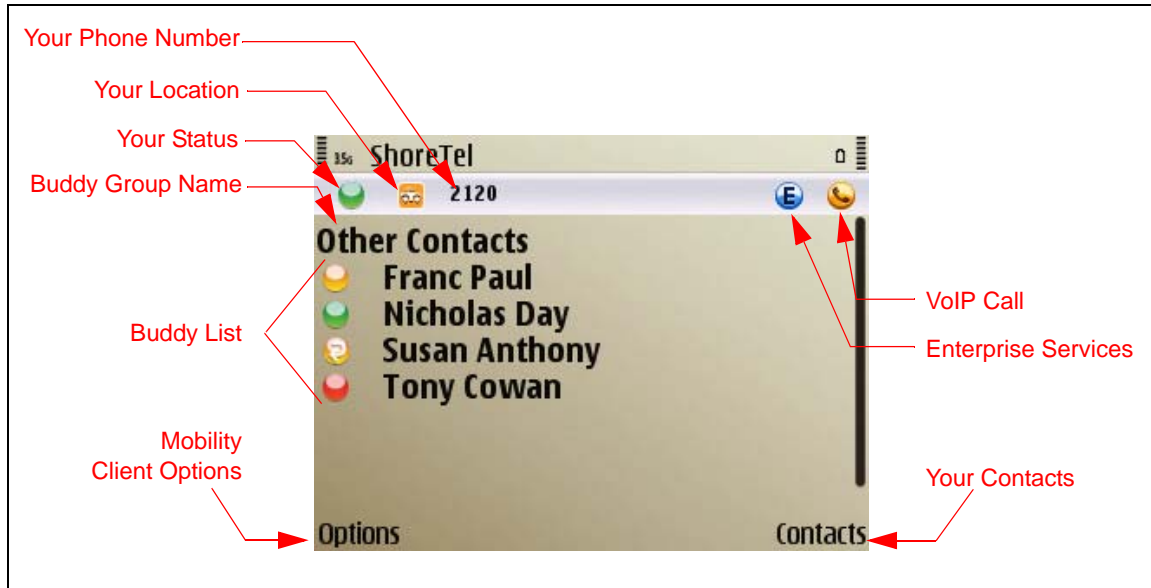
For information about your mobile device's keys, see the documentation for your mobile device.

Adding Mobility Client to Active Standby Mode Applications

You can add the Mobility Client to the list of apps in active standby mode. When you power on your mobile device, it goes into active standby mode and shows shortcuts that you can define. For more information, see the documentation for your mobile device.

The Mobility Client Application User Interface

On your mobile device, the main screen of the Mobility Client on your phone appears as follows:



- **Your phone number**—Your enterprise extension.
- **Your Location**—Your Location when Presence is enabled.
- **Your Status**—Your Status when Presence is enabled.
- **Buddy Group Name**—The Group your Buddy/User ID belongs to on the server when Presence is enabled.
- **Buddy List**—Your Buddies when Presence is enabled.
- **Instant Message**—Any active Instant Message conversation when Presence is enabled.
- **VoIP registration icon**—Registration status. When you see this icon, you can make and receive VoIP calls using the enterprise Wi-Fi network.



Note

While the VoIP registration icon indicates that VoIP is available, it does not guarantee that all calls will use the Wi-Fi network. The Mobility Client determines whether to use Wi-Fi or cellular data based on the signal strength of the enterprise Wi-Fi network and other parameters.

- **Enterprise services icon**—Enterprise services are available for use on your mobile device.
- **Buddy's Presence Message**—A Buddy's outgoing message when Presence is enabled.
- **Buddy List**—A Buddy's location when Presence is enabled.

- **Contacts**—The contact list on your mobile device. For more information about contacts, refer to the documentation for your mobile device.
- **Options menu**—Press the left selection key on the mobile device to see the following commands:
 - **Buddy List**—Add or delete Buddies.
 - **Sort Buddy List**—Change the order in which Buddies appear.
 - **Logout/Login**—Log out of or into the Mobility Client.
 - **Preferences**—Set general, network, and advanced preferences for the Mobility Client.
 - **Call Settings**—Define how calls to your enterprise phone number are routed to your mobile device.
 - **Personal Dial**—When enabled, you can place the next call directly over the cellular network by using the phone number of the SIM as the caller ID. This option toggles between **Business Dial** and **Personal Dial**.
 - **Voice Mail**—Access your cellular and enterprise voice mail.
 - **Directory Query**—Search your enterprise directory.
 - **Reprovision**—Use this option if you get a new mobile device, or if your Mobility user account gets deleted from the Mobility Router. (You must provision your device after installing the Mobility Client.)
 - **Check for updates**—When your mobile device is connected to the internet, you can check for Mobility Client software updates on the Mobility Router.
 - **Set Home Location**—Specify a Wi-Fi network outside of the enterprise as a home location.
 - **Manual SIM Swap**— In some instances, you may need to update the Mobility Router with the phone number on the SIM card, operator, and IMSI information before swapping the SIM card.
 - **About**—View version information about Mobility Client.
 - **Help**—Access help with the Mobility Client.
 - **Exit**—Exit the Mobility Client.

The following table lists the Mobility Client icons.

Table 1: Mobility Client Icons



Icon	Name	Description
	Mobility Application	You have installed the Mobility application.
	VoIP Calling	Your device can make VoIP calls using the enterprise Wi-Fi network.

Table 1: Mobility Client Icons (continued)















Icon	Name	Description
	Enterprise Services	Your mobile device can use enterprise services, such as directory query.
	Wi-Fi Network	Your call is using the Wi-Fi network.
	Cellular Network	Your call is using the cellular network.
	Personal Dial	An outgoing or incoming call is connected directly over the cellular network without going through the business/enterprise.
	Conference Call	A conference call is active.
	Forwarding	Call forwarding is on.
	Do Not Disturb	Do Not Disturb (DND) is on.
	Voice Mail	You have a new enterprise voice mail message.
	Secure VoIP Registration	A Secure Remote Voice connection to the server is available for you to securely make and receive VoIP calls using a Wi-Fi or cellular data network.
	Secure Enterprise Services	Your mobile device can use Secure Enterprise Services, such as directory query, home locations, and voice mail indicator.
	Outgoing Call Placed	You are making a call.
	Outgoing Call Connected	Your outgoing call has connected.
	Hold	A call is on hold.
	Incoming Call	A call is coming in.

Table 1: Mobility Client Icons (*continued*)

Icon	Name	Description
	Mute	Your call has been muted.
	Volume	See the volume level for the call.

Using The Mobility Client in Multiple Countries

When you travel to another country and need to switch out your SIM card, the Mobility Client can automatically route your calls for you.



Note

If you use call forwarding to a mobile device with a prepaid SIM card, calls through the enterprise go directly to voice mail. Prepaid SIM cards do not support call forwarding.

To configure the device after switching the SIM card:

1. Read the message in the device window regarding the exchange of SIM cards.
2. Touch the right selection button. The device communicates with the Mobility Router and reconfigures the device. If the configuration is successful, a success message appears. If the configuration is unsuccessful, touch the right button again.

To reprovision the device after switching the SIM card:

1. Read the message in the device window regarding the exchange of SIM cards.
2. Touch the left selection button. For more details, see [Reprovisioning on page 17](#).

Manually Swapping The SIM

In some instances, you may need to update the Mobility Router with the phone number, operator, and IMSI information for your device before you swap your SIM card.

Use the following steps to manually enter this information before replacing the SIM card:

1. Select **Applications > RA Client > Options > Manual SIM Swap**.
2. Enter the number of the mobile device, mobile operator information, and the IMSI (International Mobile Subscriber Identity) information, including the Mobile Country Code (MCC) and the Mobile Network Code (MNC).
3. Select **OK** to save changes.

Exiting The Mobility Client

To exit Mobility Client, select **Options > Exit**.

The Mobility Client no longer runs in the background. After you exit the Mobility Client, you use the native dialer and the provider cellular network to place and receive calls.

**Note**

Restricted mode users cannot exit the Mobility Client.

CHAPTER

3

Managing Calls

Using the ShoreTel Mobility Client application dialer feels the same as using your device's dialer. Just as before, you can put a call on hold and take another call, switch between active calls, transfer calls to another number or your desk phone, access enterprise and cellular voice mail, and make conference calls, as explained in the following sections:

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Receiving Calls

The main Mobility Client icon appears when you have an incoming call. You also see an icon indicating whether the call is a VoIP or cellular call. You may also see icons for other in-call options which may be different from your mobile device's native dialer options.

When you receive an incoming call, choose one of these options:

- Answer—Press the **Call** key. (Or, select **Options > Answer**.)
- Decline—Press the **End** key. (Or, select **Options > Decline**.)

Your mobile device's screen becomes active when you answer the call.

Accepting or Declining a Call While on Another Call

If you receive a second call while you are on a call, you hear a call waiting tone, and the screen indicate that there is another incoming call.

To answer a call while on another call:

- Press the Call key. The first call is put on hold and the incoming call becomes the active call.
- For information about switching between calls see [Switching Between Calls](#) on page 30.

To decline a call while on another call:

- Press the **End** key.

Placing Calls

Place a call by using the keypad to enter numbers or by selecting a contact from your contacts, buddies list, or recent calls.

Before you make a call, either start the Mobility Client application or make sure it is already running. (For information about starting the application, see [Starting and Accessing The Mobility Client on page 19](#).) The Client can be running in the background. You can use your mobile device's Contacts or call history to make calls.

If you are using the Mobility Client application to make a call over the cellular network, the call is initially routed to the enterprise before being placed to the number you are calling. Refer to [You can change the following application network preferences: on page 62](#) for details.

The following types of calls are not routed through the enterprise:

- Direct call number defined in the Mobility Router's dial plan (for example, 411).
- Calls with numbers starting with an asterisk (*) or the pound sign (#) (for example, *646# to check remaining cellular plan minutes).
- Emergency calls. Refer to [Making Emergency Calls on page 33](#) for specific information about placing an emergency call and the conditions under which these calls are allowed.
- Personal Dial calls (calls placed with Personal Dial mode enabled).

- Calls to cellular voice mail.

Complete the following steps to make a call:

1. In standby mode or with the application main screen active, enter the phone number.



Note

When placing a call to a phone number that is not an enterprise phone number, make sure that the number includes the area code if it is different from the default area code of the enterprise PBX. Contact your system administrator if you do not know the area code for the enterprise PBX. When making a call to an enterprise extension, you do not need to include an area code.

If the mobile device was in standby mode when you dialed the phone number, the ShoreTel Mobility main screen appears.

2. Press the **Call** key to place the call.

If you are on a call and the call is handed over from the enterprise Wi-Fi network to the cellular network, you might notice that the application user interface disappears briefly before appearing after the handover to the cellular network.

Placing an Active Call on Hold

To place a call on hold, select **Options > Hold**.

To take a call out of Hold mode, select **Options > Unhold**.

Placing a Call While on an Active Call

To make another call while on an active call:

1. Select **Options > New Call**.
2. Enter the new number and select **Call**. The first call is automatically put on hold.



Note

If you are on a call using the enterprise network and enter a direct call number as defined in the Mobility Router's dial plan (for example, 411) or a phone number that starts with an asterisk (*) or pound sign (#), the call on the enterprise network is dropped.

Calls to non-routable three-digit numbers (such as 911, 411, N11) or numbers starting with an asterisk or pound sign are placed directly using the cellular network and not routed through the application. You cannot simultaneously have an enterprise network call and a call routed directly through the cellular carrier's network on the mobile device.

If you have an active call and a call on hold, you can switch between the calls. For more information about switching between active calls, see [Switching Between Calls](#) on page 30.

Ending an Active Call

To end an active call:

- Press the **End** key or select **Options > End Active Call**.

If you have one active call and another on hold, select **Options > End All Calls** to end both calls.

Using Personal Dial (Dual Persona™) Mode

By default, **Business Dial** is enabled, which means when you place a call with your mobile device while running the application, the call is routed through the enterprise, and your caller ID is your enterprise phone number. Business dial through the enterprise gives you access to one enterprise phone number, enterprise telephony features, conference calling, transfer-to-desk-functionality, and so on.

Switch to **Personal Dial (Dual Persona)** mode when you want to place a call directly over the cellular network (not routed through the enterprise) and use your mobile device's phone number as the caller ID.

For example, if your enterprise phone number is 919-8000, this number is used as the caller ID when you make phone calls that are used in **Business Dial** mode. If the phone number of your cell phone is 555-4442, when you place a call with **Personal Dial** enabled, the caller ID used is 555-4442, and the call is directly placed over the cellular network.



Note

Personal Dial mode stays on until you select Business Dial again.

Enabling/Disabling Personal Dial

To enable Personal Dial mode, select **Options > Set Personal Dial**. The personal icon appears on the screen to indicate that Personal Dial is enabled.

To disable Personal Dial and return to Business Dial mode select **Options > Set Business Dial..**

Creating the ShoreTel Personal Group

If there you often call the same people using Personal Dial, you can add these contacts to a group named **ShoreTel Personal**. The ShoreTel Personal group is accessible as one of the groups in Contacts. When you call anyone in the ShoreTel Personal group, the call is always placed using Personal Dial mode.

To create a personal group:

1. Select **Options > Create Personal Group**.
2. Select one of the following options:

- **Yes**—Start adding contacts to the ShoreTel Personal group. See [Adding Contacts to the ShoreTel Personal Group on page 29](#) for details.
- **No**—Do not add contacts to the ShoreTel Personal group at this time. The ShoreTel Personal group is created. You can add contacts to the ShoreTel Personal group later. See [Adding Contacts to the ShoreTel Personal Group on page 29](#).

Adding Contacts to the ShoreTel Personal Group

After creating the ShoreTel Personal group, you can add contacts to the group.

To add contacts to the ShoreTel Personal group:

1. From the application main screen, select **Contacts**.
2. Scroll to the groups tab.
3. Navigate to **ShoreTel Personal**.
4. Select **Options > Add to Contacts**.

Deleting the ShoreTel Personal Group

If you delete the ShoreTel Personal group when you call any contacts that were members of the group, the calls do not use Personal Dial mode.

To delete the ShoreTel Personal group:

1. From the application main screen, select **Contacts**.
2. Scroll to the groups tab.
3. Navigate to **ShoreTel Personal**.
4. Select **Options > Delete**.
5. At the confirmation prompt, select **Yes** to delete the group. The group is deleted.

Using Contacts and Log to Place Calls from the ShoreTel Mobility Client

You can use the Contacts and Log on your mobile device with the ShoreTel application.

Using Contacts to Place Calls

From the application main screen, press the right selection key to select Contacts. Select the name of the contact and then select the **Call** button.

Using Log to Place Calls

From the application, select **Call** to view the log list and select the contact.

Using the Loudspeaker

While you are on an active call, select loudspeaker to use the phone in hands-free mode.



WARNING!

Do not hold the mobile device to your ear while the loudspeaker is on.

To use the loudspeaker:

- Select **Options > Loudspeaker**.

To turn off the loudspeaker:

- Select **Options > Handset**.

Muting a Call

While you are on an active call, you can mute your line so that the other party cannot hear you.

To mute a call:

- Select the **Mute button** in the lower right corner, or **select Options > Mute**.

To unmute a call:

- Select the **UnMute button** or **select Options > UnMute**.

Switching Between Calls

If you have one active call and one call on hold, you can switch between the calls. To switch between calls:

- Select **Options > Swap**. The call that was active is put on hold, and the other call is now active.

If you have one active call and one call on hold, moving out of range of the enterprise Wi-Fi network, drops the call on hold.

Transferring Calls

While you are on an active call on your mobile device, you can transfer the call to a specified phone number or another one of your devices.

By default, transferring a call to your desk phone transfers to your enterprise extension. For more information, see [Changing Call Settings](#) on page 65.

Transferring Calls to a Specified Contact

1. Select **Options > Transfer**. The active call is put on hold.
2. Choose one of the following options:
 - For **Phone Number**, enter the phone number or first few letters of the person's name to receive the transfer, or
 - Select **Find** and navigate to the contact.
3. Choose **Select** on the desired contact. The contact's name and phone number appear.
4. Select **Transfer**. The call transfers to the number that you specified.

Transferring Calls to Your Desk Phone

By default, when you transfer a call to your desk phone, the call is transferred to your enterprise extension, which is set in the Call Settings screen. 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 in the Call Settings screen. For more information, see [Changing Call Settings](#) on page 65.

While on an active call, to transfer a call to your desk phone:

- Select **Options > Transfer To Desk**. The call is transferred to your desk.

Managing Conference Calls

You can merge two VoIP calls into a conference. You can start conference calls while connected to the enterprise Wi-Fi network or while using the cellular network as long as the outgoing calls are routed through the enterprise and you are using Secure Remote Voice.



Note

You cannot make a conference call using the cellular network.

To make a conference call:

1. Place a call to one of the conference call members.

2. While the call is active, select **Options > Conference**. The call is placed on hold.

**Note**

You can start a conference call only by selecting **Options > Conference** options to place the call to the third participant. You cannot call the third participant while the second participant is on hold and establish a conference call with the two parties.

3. Choose one of the following options:
 - a. In the **Phone Number** box, enter the phone number of the other conference call member, and then press the **Call** key.
 - b. Select **Find** to navigate to the contact you want to call. Choose **Select** to see the contact name and phone number. Select the number you want from the list and choose **Conference** with the left button.
4. After the caller answers, select **Join Conference**. The first call that you placed is now active, and both callers are now on a conference call. The conference icon appears, indicating that all conference call members are connected. Press **Cancel** to return to the previous call.

**Note**

While on a conference call, you cannot transfer the call from your mobile device to your desk phone. Any of the conference call participants using a mobile device running the application can transfer the call to a desk phone.

Changing the Network While on an Active Call

You can set the default network used to place and receive calls using the Network Preferences tab. Refer to [You can change the following application network preferences: on page 62](#) for more information.

When you change the network from Wi-Fi to cellular, the application main screen briefly closes while the call is handed over from the wireless network to the cellular network. When the call is handed over to the cellular network, the application main screen re-opens.

To change the network while on an active call:

1. Select **Options > Network Selection**.
2. Select one of the following options:
 - **Wi-Fi**—Use only the specified wireless network (WLAN).
 - **Cell**—Use only the cellular network.
 - **Auto**—If the mobile device is within range of the enterprise Wi-Fi network, calls are made and received using that network when possible. If the mobile device is not within range of the enterprise network, the cellular network is automatically used.

3. Select **OK**.

Accessing Voice Mail

You can access the following types of voice mail from your mobile device:

- Cellular voice mail—Voice mail for the phone number of your mobile device
- Enterprise voice mail—Voice mail for your enterprise (corporate) phone number

Accessing Cellular Voice Mail

The Mobility Client automatically tries to retrieve the cellular voice mail box number on your SIM card. You can also use the **Advanced Preferences** tab to manually configure the phone number used to access the cellular voice mail. See [Changing Advanced Settings on page 63](#) for details.



Note

Any calls to access your cellular voice mail go over the cellular network and not through the enterprise.

To check cellular voice mail:

1. Select **Options > Voice Mail**.
2. Select **Cellular** to connect to your cellular voice mailbox.

Accessing Enterprise Voice Mail

When you have enterprise voice mail, you see a voice mail indicator on the screen.

To check enterprise voice mail:

1. Select **Options > Voice Mail**.
2. Select **Enterprise** to connect to your enterprise voice mail system.

Making Emergency Calls

To make a call to an emergency number, dial the emergency number as you normally would. Calls that you make to emergency numbers are not routed through the enterprise.

**Note**

If **Enable Emergency calls over VoIP** is set on the ShoreTel Mobility Router, you can make 911 calls over Wi-Fi or cellular data network. Check with your System Administrator for more information. However, no matter what the ShoreTel Mobility Router's settings are, if you are on the cellular network and coverage is detected, the application uses this method to make emergency calls.

**WARNING!**

If **Enable Emergency calls over VoIP** is not set (disabled) on the ShoreTel Mobility Router, and your mobile device *cannot access the cellular network*, you cannot make emergency calls.

If you are on a call using the enterprise Wi-Fi network and make a call to an emergency number, the non-emergency call is dropped.

On GSM devices, you can also make emergency calls even if there is no SIM card in the mobile device if your cellular service provider supports this feature.

CHAPTER

4

Presence and Instant Message

After installing the ShoreTel Mobility application, if Presence is enabled, your mobile device shows your status and location, as well as the presence of your buddies who are configured in the enterprise and registered on the server. Your Presence is automatically updated, for example, if you are available, in a meeting, or traveling, and so on.











This chapter contains the following sections:

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Setting Presence Status.....	37
Setting Location	37
Editing the Presence Message	38
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Presence Icons

The following table describes the application icons and their descriptions on the XMPP Server:

Table 2: ShoreTel Mobility Client Icons and XMPP Status

Client Icon	Client Description	XMPP Status
	Available	Available or Free to Chat
	Away	Extended Away
	Inactive	Away - I'm Away
	In a Meeting	Away - In a Meeting
	Be Right Back	Away - Be Right Back
	Out of Office	Away - Out of Office
	In a Call	Away - On Phone
	Busy	DND
	DND	DND
	Offline	Unavailable

Enabling Presence

Enable Presence to add or delete buddies, create groups of buddies, sort buddies, as well as allow others in the network to view your location and your availability.

**Note**

When you enable Presence for the first time, the application may prompt you to confirm your user name and password if your server user name differs from your Mobility Router user name. Enter your credentials to resolve this authentication.

Complete the following steps to enable Presence:

- From the Home screen, select **Options > Preferences > Presence > Enable**.

Setting Presence Status

Set your Presence status so your buddies can see your availability, as follows:

1. Scroll to the top of your buddy list so that none of your buddies are highlighted and so you can modify your ID.
2. Select the center button to see a pop-up menu, and then select **Set Presence**.
3. Choose a status from the list.

**Note**

Depending on the status you choose, the indicator next to your buddy name changes.

Setting Location

Set your location to allow your buddies to view your location status, as follows:

1. Scroll to the top of your buddy list so that none of your buddies are highlighted and so you can modify your ID.
2. Select the center button to see a pop-up menu, and then select **Set Location**.
3. Choose a location from the list, as follows:
 - a. Select **Custom Location** to enter a customized location. In the **Enter location name** field, use the keypad to type in the details of the location.
 - b. Select **OK** to continue and display the new location message, or select **Cancel** to return to the **presence** window without saving changes.

**Note**

Depending on the status you choose, the indicator next to your name changes.

Editing the Presence Message

Set an outgoing note from you that all of your buddies see, as follows:

1. Scroll to the top of your buddy list so that none of your buddies are highlighted and so you can modify your ID.
2. Select the center button to see a pop-up menu, and then select **Edit Message**.
3. In the **Display Message** field, use the keypad to type a message.
4. Select **OK** to continue and display the new outgoing message, or select **Cancel** to return to the presence window without saving changes.

Adding and Deleting Buddies

You can add or delete buddies.

Adding Buddies

To add a buddy:

1. Select **Options > Buddy List**.
2. Select **Add Buddy**.
3. In the **Enter Buddy Name** field, type in the Uniform Resource Identifier (URI) name as entered on the enterprise server, for example john@eng.shortel.com or 1175@qa.shoretel.com, or enter the extension number, for example 1175. Check with your system administrator if you are unsure of the credentials.
4. Select **OK** to continue and display the new buddy, or **Cancel** to return to the presence window without saving changes.

Deleting Buddies

To delete *one* buddy:

1. Select **Options > Buddy List > Delete Buddy**.
2. Select a buddy, then select **Delete Buddy**.
3. Select **Yes** or **No** when prompted **Are You Sure?**

To delete *all* buddies:

1. Select **Options > Buddy List**.
2. Select **Delete All**.

3. Select **Yes** or **No** when prompted **Delete?** If **Yes**, you remove all buddies in the list.

Setting a Buddy's Access Level

You can give your buddies the following different access levels to your network.

Table 3: Access Levels

Access Level	Description
Personal	Contacts see your published contact information, including home and mobile phone numbers, as well as schedule and availability details
Team	Contacts see your published work and mobile phone numbers, as well as schedule and availability details. Contacts at this level may interrupt you when your status is Do Not Disturb
Company	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	Contacts see your name, email address, title, company, and your status
Blocked	Contacts cannot send you instant messages, and they can only see your name and e-mail address. Your status appears as offline



Note

Depending on the configuration of your mobile device and server, you might see different options from the following examples.

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

1. From the application, select a buddy.
2. Press the center button on the keypad to view buddy options.
3. Select **Access Level**.
4. Select the access level you want.

Viewing Buddy Details

You can view buddy status, location, and contact information, as follows:

1. From **the application**, select a buddy.
2. Press the center button on the keypad to view buddy options.
3. Select **View Details**.

Your buddy's information appears, including status, location, access level, and contact information. This information is read-only by everyone other than this buddy.



Note

Depending on the configuration of your mobile device and server, you might see different options from the following examples.

4. Select **Back** to return to the main presence window.

Sorting the Buddy List

Use the following steps to sort your buddies:

1. Select **Options > Sort Buddy List**.
2. Choose how you want to sort your buddies from **Sort By Name**, **Sort By Availability**, or **Sort By Location**. After you make a selection, the screen returns to the newly sorted buddy list.

Making Groups of Buddies

You can create groups on the server and assign buddies to one or more groups.



Note

When you assign a buddy to a group on the server, both the group name and buddy name are read-only in the buddy list on your mobile device. You also cannot add, delete, or modify groups on your mobile device, only on the server.

Sending Instant Messages to Buddies

Use the Instant Message (IM) feature to chat with a buddy when Presence and IM are enabled.



Note

To send an IM, you need data connectivity to the Presence server. (For more information, refer to [Using Instant Message While on a Call on page 44.](#))

Also, a buddy with the status of **Do Not Disturb (DND)** or **Offline** cannot receive IMs.



Tip

You can copy and paste IMs. Touch and hold an IM to use your mobile device's copy and paste functions.

Starting a Conversation

To start an IM conversation:

1. Select a buddy.
2. Press the center button to view buddy options, and then select **Send IM**. The IM conversations window appears, and the cursor flashes in the text area.
3. Enter your message and press the center button or **Enter** to send the IM.



Tip

Press left/right/up/down on the center button to navigate and edit the IM. Use Shift+Enter to start a new line.

The conversation appears in the upper window. Your part of the conversation appears as "me."

4. The **Conversations** window displays all conversations. You can view the **Conversations** window as follows:
 - From the IM, select **Back**, or select **Options > Close** to close this IM.



5. Select **Back** in the Conversations window to exit this window and return to your buddy list.



Note

Refer to [Viewing Previous Conversations on page 42](#) for more information about retrieving previous IMs that you have not closed.

Replying to an IM

When you receive an IM, the message pops up on your device's screen, and the cursor flashes in the IM text field. Reply to an IM, as follows:

- Enter text and press the center button or the Enter key.



Tip

Press left/right/up/down on the center button to navigate and edit the IM. Press Shift+Enter to start a new line.

The conversation appears in the upper window. Your part of the conversation appears as "me."

Viewing Previous Conversations

You can open previous conversations to continue them.

1. From **the application**, select **Options > Conversations** to view all previous IMs that have not been closed.
2. Press up/down on the center button to scroll to and select an IM.
3. Select **Open** to retrieve and continue a session, **Close** to close this IM session, or **Close All** to close all IM sessions.

Starting Multi-Party Conversations

You can add participants to a conversation to create a multi-party conversation. When you start a multi-party conversation, you are called the Moderator, which means can also remove one or more participants from the conversation.

Adding Participants

1. After you start an IM with one participant, select **Options > Add Participants**.



2. Scroll to a participant then press the center button or select **OK** to add. This participant is now added to the address line of the IM.

Any further messages from the existing participants are now visible to the new participant, and the new participant's messages are now visible to the existing participants.



Note

To add multiple participants, use the Shift key + center button to select each participant you want to add. A checkmark next to the name indicates you selected a participant. Select **OK** to add all checked participants to the current conversation, or select **Cancel** to return to the conversation without adding any participants.

Replying to a Multi-Party Conversation

When you receive a multi-party IM, the message pops up on your screen, and the cursor flashes in the IM text field. Enter text as described in [Replying to an IM on page 42](#). Everyone in the conversation can see your messages.

Switching Devices in the Middle of a Conversation

If you are in an IM conversation and need to switch to another one of your configured devices (including your computer), you can automatically re-join the conversation without losing any of your incoming messages.

Removing Participants

When you start a multi-party conversation, you are the Moderator, which means only you can remove participants from a conversation.

Using the desktop instant message client, a Moderator can grant Moderator privileges to other users. (Refer to your desktop instant message client documentation for more information about granting Moderator permissions.)



WARNING!

You cannot remove a Moderator from a conversation.

If you are a Moderator, you can remove a participant, as follows:

1. In an IM with at least two participants, select **Options > Remove Participants**.
2. Scroll to a participant then press the center button or select **OK** to remove. This participant is now deleted from the address line of the IM and is no longer part of the conversation.



Note

To remove more than one participant, select the Shift key + center button to select a participant. A checkmark next to the name indicates you selected a participant. Select **OK** to remove all checked participants to the current conversation, or select **Cancel** to return to the conversation without removing any participants.

Making and Receiving Calls while Using Instant Messages

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

Making a Call During an IM Session

1. From the IM session, select **Back** to view the **Conversations** window, then select **Back** again to view the buddy list.
2. Select the buddy and then use the center button to select **Call Work**, **Call Home**, or **Call Mobile**. The call window appears. You can navigate between the call window, the buddy list, and the IM using the left/right navigation keys.



Note

If your buddy does not have any phone numbers (cellular, enterprise, or home) on the server, you cannot call that buddy.



Note

To call someone not on your buddy list, select **Back** to view the Conversations window, then select **Back** again to return to the main application screen. Select **Options > Directory Query** or enter digits to make a call. See [Searching for People, Places, and Things on page 57](#) for more details.

Receiving a Call During an IM Session

If you receive a call during an IM session, the call appears in the main window. Respond to the call using the **Answer** or **Decline** options.

Using Instant Message While on a Call

You can start or respond to IMs during a call just as you would a normal IM session. The caller is not put on hold.

- Press left on the center button to view your buddy list.

Refer to [Starting a Conversation on page 41](#) and [Adding Participants on page 42](#) for information about starting a single or multi-party IM conversation.

Refer to [Replying to an IM on page 42](#) for how to respond to an IM popup.

To respond to an IM while on a call:

Logging In/Out

Log off of the Presence server, as follows:

- Select **Options > Logout**.



Log on to the Presence server, as follows:

- Select **Options > Login**.

Sending Email to a Buddy

First, configure your mobile device's email settings if you have not already done so. Then, send an email to a buddy, as follows:

1. Select a buddy.
2. Press the center button to view buddy options.
3. Select **Send Email**.
4. Select an email application to use for sending the email.

After the message is sent, the main presence window appears. A brief pop-up message tells you that your message has been sent.

Transferring a Call to a Buddy

While you are on an active call, you can transfer the call to a buddy.



Note

Transferring a call on the cellular network takes longer than for a call on the enterprise Wi-Fi network. A cellular transfer dials out a second call using the cellular interface.

Use the following steps to transfer a call to a buddy:

1. While on an active call, press left on the center button to view the buddy list.
2. Select a buddy.
3. Press the center button to view buddy options and select **Transfer To** to transfer the call.

Conferencing with a Buddy

While you are on an active call, you can add a buddy to the conference, as follows:

1. While on an active call, press left on the center button to view the buddy list.
2. Select a buddy.
3. Press the center button to view buddy options and select **Conference** to add your buddy to the active call.

Calling a Buddy

Call a buddy's cellular or enterprise device, as follows:

1. Select a buddy.
2. Press the center button to view buddy options.
3. Select **Call Work**, **Call Home**, or **Call Mobile**.

Calling a Buddy While On Another Call

You can call a buddy while on another call. The first call is placed on hold when you call the second party. You do not need to manually place the first call on hold.

To call a buddy when already on a call:

1. While on the first call, select the left key on the center button to view the buddy list.
2. Select a buddy and press the center button to view buddy options.
3. Select **Call Work**, **Call Home**, or **Call Mobile**, depending on which numbers are configured on the server.

Calling Voice Mail

If you have a voice mail icon indicating that you have a voice mail message, you can access your cellular or enterprise voice mail from the Presence screen. (For the voice mail icon, see [Table 1 on page 21.](#))

Complete the following steps to call voice mail:

1. Scroll to the top of the buddy list so that none of your buddies are highlighted, and so you can perform actions for your ID.
2. Select the center button to see a pop-up menu.
3. Select **Call Voice Mail**. In the pop-up window, select **Cellular** or **Enterprise**.



Note

The enterprise voice mail number dialed is based on the information on the server. Refer to the *ShoreTel Mobility Router Administration Guide* for more about configuring information on the server.

Searching for a Buddy

Use the following steps to search for a buddy:

1. From the application, scroll down into the active buddy list and enter the first few characters of the user you are searching for.

The letters that you enter appear as numbers on the screen. For example, entering TRA shows as 87772 (8=T, 777=R, 2=A). Note that 777 is equal to 3 key-presses for the letter R.

2. Press the Call button to call the number on your screen.

CHAPTER

5

Secure Remote Access

Depending on how your account is configured, you may have access to the following secure remote access features:

- **Secure Remote Voice (if licensed):** You can securely place and receive calls using a Wi-Fi 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 location with data connection and have access to enterprise and desk-phone features, just as you do when you are in the enterprise.
- **Secure Enterprise Services:** You can access services, such as directory query and managing home locations, from any Wi-Fi or cellular data network also outside your enterprise.

Contact your ShoreTel Mobility 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	49
Verifying that Secure Remote Voice Is Enabled	50
Verifying that Secure Enterprise Services Are Enabled	51

Before You Begin

To use Secure Remote Voice and Secure Enterprise Services, perform the following actions:

- Create a Wi-Fi access point on your mobile device for a non-enterprise Wi-Fi network. Refer to for details.

- Enable data access over Mobile network on the device.
- Configure and connect to a non-enterprise Wi-Fi network using your mobile device. This is optional if using cellular data.
- Configure preferred network settings. Refer to [You can change the following application network preferences: on page 62](#) for details.
- Add the non-enterprise Wi-Fi network as a preferred connection in the application. Optional if using cellular data.
- Verify that Secure Remote Voice and Secure Enterprise Services are accessible with your Mobility user account. Refer to [Verifying that Secure Remote Voice Is Enabled on page 50](#) and [Verifying that Secure Enterprise Services Are Enabled on page 51](#).

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 application.

**Note**

Before you prepare to use Secure Remote Voice or access Secure Enterprise Services, verify that your 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 that Secure Remote Voice Is Enabled

After you add the remote Wi-Fi network as a preferred connection in the application, your mobile device automatically connects to the Wi-Fi network and is registered with your organization's IP-PBX system.

If you see the Secure Remote Voice icon, the mobile device is registered, which means VoIP is available. The icon's presence does not guarantee that all calls use Wi-Fi. The ShoreTel Mobility solution determines how to route a call based on the signal strength of the Wi-Fi network, even if VoIP is available.

**Secure Remote Voice**

Verifying that Secure Enterprise Services Are Enabled

After you add the remote Wi-Fi access point as a preferred connection in the application, your mobile device automatically connects to the Wi-Fi network and attempts to register for Secure Enterprise Services.

You can securely access enterprise services such as directory search, home locations, and the enterprise voice mail indicator when you see the following Secure Enterprise Services icon:



Using Location Management

Using the ShoreTel Mobility Client, you can specify a Wi-Fi network outside of the enterprise as a home location. Creating a home location allows you to use that location as criteria when defining how outgoing cellular calls are routed and defining calling rules.

This chapter contains the following sections:

Verifying Secure Enterprise Services Availability.....	53
Adding Home Locations	53
Deleting Home Locations	55

Verifying Secure Enterprise Services Availability

You can create a home location for a remote Wi-Fi network if your account is configured to access Secure Enterprise Services. If you are not sure whether your account has been configured to access Secure Enterprise Services, ask your system administrator.

Adding Home Locations

When you are at home or another remote location that has a Wi-Fi network, you can use the application to create a home location, which defines information about the Wi-Fi access point, such as the service set identifier (SSID) and basic service set identifier (BSSID). When you create a home location using the application, the location information is automatically sent to the Mobility Router, which allows it to route outgoing cellular calls based on your location. If you define calling rules, you can use location as criteria to define how calls are routed.

If you use the application to create a home location, there are two methods you can use:

- **Automatic**—Use this method if you do not know the SSID of the access point, need to specify a particular SSID, or do not need to specify multiple BSSIDs of the Wi-Fi access point.

When you use the automatic method, you cannot specify an SSID for the home location. The SSID of the access point is automatically used. If there are multiple SSIDs at the location, the first SSID that the application detects is the one used.

- **Manual**—Use this method if you want to specify a particular SSID (for example, the location has multiple SSIDs), or know that the Wi-Fi access point has multiple BSSIDs and you want to define specific BSSIDs for the home location.

Each home location must have a unique SSID.

In addition to managing home locations with the application, you can also manage home locations with the User Portal, as described in the *ShoreTel Mobility User Portal Guide*.

Complete the following steps to add a home location:

1. In the ShoreTel Mobility Client main screen, select **Options > Preferences**.
2. In the **Network Preferences** tab, scroll to **Home Locations**, and select **Options > Change**.
3. Select **Options > Add Location**.
4. Select one of the following options:
 - **Automatic**—Select this option if you do not know the SSID and BSSID of the access point or do not need to specify these values yourself. The SSID and BSSID are automatically retrieved from the access point, and you cannot edit the values before adding the home location.
 - **Manual**— Select this option if the access point has multiple SSIDs or BSSIDs.

The Add Location screen appears.

1. Select the **Name** field.
2. In the **Name** box, enter the name of the home location. The name can be up to 64 alphanumeric characters long and can contain spaces, hyphens (-), and underscores (_).
3. Select **OK**.
4. Verify the SSID.
5. Complete one of the following steps:
 - If you do not need to change the SSID, go to Step 8.
 - If you need to change the SSID, select the SSID field, and go to Step 6.



Note

If you selected the **Automatic** method to add a location, you cannot edit the SSID. You can change the SSID value when editing an existing location.

6. In the **SSID** box, enter the SSID. The name can be up to 64 alphanumeric characters long and can contain spaces, hyphens (-), and underscores (_).
7. Select **OK**.
8. Verify the BSSID.
9. Complete one of the following steps:
 - If you do not need to change the BSSID, go to Step 2.
 - If you need to change the BSSID, select the **BSSIDs** field, and go to Step 1.



WARNING!

If you selected the **Automatic** method to add a location, you cannot edit the BSSID. You can change the BSSID value when editing an existing location.

1. Select the BSSID(s) that you want defined as part of the home location, and select **OK**.
2. On the Add Location screen, select **Options > Save**. The home location is added to the Home Locations page.

Deleting Home Locations

If you no longer want to include a home location as part of your user profile, you can delete it. If you have only one home location defined and delete it, any calling rules or call routing options that use a home location as criteria will no longer be activated when you are in proximity of the home location. Use the User Portal to determine if your location is being used in your calling rules or calling options. For more information, see the *ShoreTel Mobility User Portal Guide*.

Complete the following steps to delete a home location:

1. In the ShoreTel Mobility Client main screen, select **Options > Preferences**.
2. In the **Network Preferences** tab, scroll to **Home Locations**, and select **Options > Change**.
3. Navigate to the home location that you want to delete, and select **Options > Delete Location**.
4. Make sure that the home location you want to delete is selected.
5. Select **Options > Save**. The home location is deleted.

CHAPTER

7

Searching for People, Places, and Things

The ShoreTel Mobility Client allows you to search the corporate directory from your mobile device when connected to the enterprise Wi-Fi network. You can search the corporate directory if your company uses an LDAP-based corporate (enterprise) directory server and your system administrator has configured the ShoreTel Mobility Router to search that directory server.

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 cellular data network. Searching the corporate directory using a remote Wi-Fi or cellular data network is a secure transaction.

This chapter contains the following sections:

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Searching the Corporate Directory.....	58
Viewing Directory Search User Information	58
Placing a Call Using Directory Search	59
Adding a Directory Search Match to Contacts	59

Using the Corporate Directory outside of the Enterprise

You can use the following networks to search the corporate directory when outside of the office:

- Cellular 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 may incur data charges as described in your service plan. For information about your mobile device and cellular service plan, contact your cellular service provider or your system administrator.

- 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.

For information about how to set up your mobile device to access Secure Enterprise Services, see [Secure Remote Access on page 49](#).

Searching the Corporate Directory

If your mobile device is connected to the enterprise Wi-Fi network, you can search the corporate directory just as if you were using your desk phone. If you have access to Secure Enterprise Services, you can also search the corporate directory using a remote Wi-Fi or cellular data network.

To search the corporate directory:

1. Select **Options > Directory Search**.
2. Enter a string of letters or numbers that you want to search for in the corporate directory, and select **OK**.

If the mobile device is not registered to access Secure Enterprise Services, the Directory Search option does not appear in the Options menu. For information about setting up secure remote access, see [Secure Remote Access on page 49](#).

If a search matches a large number of records in the directory, you may not see not all records on your screen. If any names in the directory match the string that you typed, those names appear. For example, entering “joe” displays all users with first name or last name that start with this string. If no names in the directory match the string that you typed, a message stating that no matches were found appears.

Viewing Directory Search User Information

If your search finds a match, you see any associated information that a user has chosen to display in the corporate directory (for example, home number or personal cell number).

The contact information that is listed depends on the information that is in the corporate directory. For example, if a person does not enter a home phone number in the corporate directory, you do not see a home phone number for that person in the additional contact information.

To see more details about a search results match:

1. From the list of Directory Search matches, scroll to the person's name.
2. **Options > View Details.**

The information you see for each person depends on what information the person has registered on the enterprise server.

Placing a Call Using Directory Search

You can call a person in the directory search match list using the contact information from the list instead of manually dialing the person's phone number.

To place a call using a directory search match:

1. From the list of directory search matches, scroll to the person that you want to call.
2. To place a call, select **Options > Call** or press **Call**.
3. Scroll to the phone number you want to call, and select **Call** to place the call.

Adding a Directory Search Match to Contacts

You can add contact information from any directory search match to your mobile device's local contacts.

To add a Directory Search match to your contacts:

1. From the list of directory search matches, scroll to the person that you want to add to your contacts.
2. Select **Options > Add Contact**.
3. To add the person to your contacts, select **Yes**.

CHAPTER

8

Changing ShoreTel Mobility Client Preferences

You can modify general, network, and advanced ShoreTel Mobility Client preferences. You can also change call settings, such as Do Not Disturb; call forwarding; enabling and uploading logs.



Note

You cannot modify your preferences if you are a Restricted mode user. See your ShoreTel Mobility administrator for information about Restricted and Full client privilege modes.

This chapter contains the following sections:

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Changing Network Preferences	62
Changing Advanced Settings.....	63
Changing Presence Preferences	67
Uploading Logs to the ShoreTel Mobility Router.....	69

Viewing General Preferences

You can view general preferences, such as Mobility Router Address, Extension, and Remote Access Address as follows:

- Select **Options > Preferences** to display the **General** tab. Verify the information. These fields are read-only.

Changing Network Preferences

You can change the following application network preferences:

- Specify the networks to be used to place and receive enterprise calls.
- Specify the networks used to connect to the ShoreTel Mobility Server.
- Specify the **Preferred Wi-Fi Connections** or access points (APs) that the mobile device connects to when in range.
 - If you select multiple APs, the APs that you have used most recently are the APs that the mobile device tries to connect to first.
- Specify the **Preferred Data Connection** or access points that the mobile device uses for connectivity to a cellular data network.
 - If you have Secure Remote Voice and Secure Enterprise Services enabled for your account, you can use a data network connection to securely make calls and use enterprise services.
 - If Secure Remote Voice is enabled for the ShoreTel Mobility solution for your enterprise, you can also specify a home location as a preferred connection, allowing you to make VoIP calls using the Wi-Fi network of the home location.
- Specify home locations, which are Wi-Fi networks outside of the enterprise. Creating a home location allows you to use location as criteria when defining how cellular calls are routed and defining calling rules.

To modify your network preferences:

1. Select **Options > Preferences**. Use the right scroll key to navigate to the **Network** tab.



2. To change the network the mobile device connects to, use the scroll key to navigate to **Network Selection**.
3. Select **Options > Change**.
4. Select one of the following networks:
 - **Wi-Fi**—Use only the enterprise Wi-Fi network.
 - **Cell**—Use only the cellular network.

- **Auto**—If the mobile device is within range of the enterprise Wi-Fi network, calls are made and received using that network when possible. If the mobile device is not within range of the enterprise network, the cellular network is automatically used. This option is the default value.

5. Select **OK**.

To change the preferred access points for the application:

Use the scroll key to navigate to **Preferred Connections**. Select **Options**, and then choose from the following actions:

- To change the preferred access points, select **Change**. A list of access points appears.

Navigate to the access point that you want to change. Press the scroll key to select/deselect each access point you want to change. Select **OK**.

- To create a new access point, select **New Access Point**.

For more information about adding a new access point, select **Options > Help** and refer to the documentation for your mobile device.

To specify preferred data connections:

1. Scroll to **Preferred Data Connections**, and then select **Options > Change**.
2. From the list of data access points, select or clear the access points that you want to use as preferred data connections.
3. Select **OK**.
4. To set a home location, scroll to **Home Locations**. (For information about creating a home location, see [Adding Home Locations on page 53](#).)

Changing Advanced Settings

You can modify the following advanced settings:

- Verify the phone number or extension you use to access enterprise voice mail.
- Set the phone number you use to access cellular voice mail.
- Select one of the following power-save mode for your device.
- Set the maximum number of entries to save in the log.

To change advanced settings:

1. Select **Options > Preferences**, and then scroll to the **Advanced** tab.



2. To change your enterprise voice mail number:
 - a. Navigate to **Enterprise Voice Mail Number**, and select **Options > Change**.
 - b. Enter the phone number or extension you want to use to access enterprise voice mail.
 - c. Select **OK**.
3. To set your cellular voice mail number:
 - a. Navigate to **Cellular Voice Mail Number**, and select **Options > Change**.
 - b. Enter the phone number used to access cellular voicemail.

The cellular voice mail number is the phone number that the application calls to access cellular voice mail for the mobile device. Usually, this is your own phone number.
4. To set whether to automatically start the ShoreTel Mobility application when you turn on your phone:
 - a. Navigate to **AutoStart** and select **Options > Change**.

When you first started the application, you were asked whether you wanted the application to automatically start when you power on the mobile device. You can change your initial response here.
 - b. Select **On** or **Off**.
 - c. Select **OK**.
1. To set the power save mode:
 - a. Navigate to **Power Save Mode**, and select **Options > Change**.
 - b. Select one of the following:
 - **Always On**—Always search for one of the defined preferred access points and maintain a connection if within range.

- **Enterprise Only**—Use Wi-Fi when your device is in range of the enterprise. If not in range of the enterprise, do not attempt to connect to a preferred access point.
 - **Calls Only**—Connect to a preferred access point only when you make or receive calls.
- 2. To set the maximum number of entries to save in your call log:
 - a. Navigate to **Maximum Call Log Entries**, and select **Options > Change**.

Enter the maximum number of entries to be saved in the Log. You can enter a value from 100 through 999. The default value is 100.
 - b. Select **OK**.
- 3. To set the tunnel protocol, navigate to **Tunnel Protocol**, select **Options > Change**, and select one of the following options:
 - **Auto**—Uses the protocol based on how the Mobility Router is configured by your ShoreTel Mobility administrator.
 - **UDP**—Specifies **User Data Protocol** as the protocol for the secure tunnel.
 - **TCP**—Specifies **Transmission Control Protocol** as the protocol for the secure tunnel.
- 4. To set in-call options, which allows you to specify the function of the right selection key on the mobile device while you are on a call:
 - a. Navigate to **In-Call Options**, and select **Options > Change**.
 - b. Assign one of the following actions for the right selection key:
 - **Mute**
 - **Loudspeaker**
 - **Transfer To Desk**
 - **Transfer**
 - **Conference**
- 5. Select **OK**, and then select **Back** to return to the application main screen, or select one of the following options to continue changing settings:
 - Scroll to the **General** tab to change general preferences. See [Viewing General Preferences on page 61](#) for details.
 - Scroll to the **Network** tab to change network preferences. See [Changing Network Preferences on page 62](#) for details.

Changing Call Settings

You can specify how your enterprise phone number routes calls to your mobile device, as follows:

- **Call Forward**—Forward all calls to a specified phone number or voicemail.

- **Do Not Disturb (DND)**—Ring your desk phone ring *but not your mobile device* for all incoming calls.
- **Transfer to Desk**—Set the enterprise phone number for transferring calls to your desk phone.
- **Reverse Dial**—Using this feature can reduce the cost of a call. The ShoreTel Mobility Router automatically calls back the device when placing outgoing calls, changing an outbound mobile call to an inbound call. This feature is only available only when a data connection is available (Wi-Fi/data) and is not available for conferences. Reverse dial also must first be enabled on the ShoreTel Mobility Router by a system administrator.

To modify your call settings:

1. Select **Options > Call Settings** to see call settings.



2. Scroll to one of the following call settings, and select **Options > Change**:
 - **Call Forward**—Choose one of the following options:
 - **None**—Do not forward calls. Send them to the mobile device.
 - **Forward to Voicemail**—Immediately forward all calls to voice mail. Incoming calls to your enterprise phone number do not ring your desk phone or mobile device.
 - **Other**—Forward all calls to a phone number that you specify. After you select this option, enter the phone number to which calls are forwarded, and select **OK**. (Or select **Cancel** to revert back to the previous setting.)
 - **DND**—(Do Not Disturb) When enabled, only your desk phone rings for all incoming calls to your enterprise phone number. Your mobile device does not ring.
 - **Transfer To Desk**—By default, transferring an active call from your mobile device to your desk phone uses your enterprise extension.

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. For more information about which number your PBX uses to transfer calls, contact your ShoreTel Mobility administrator.

Complete the following steps to change the phone number used to transfer calls to your desk phone:

- a. Scroll to **Transfer To Desk**, and select **Options > Change**.

- b. Enter the phone number or extension that is used when transferring active calls to your desk phone, and select **OK**.
 - **Reverse Dial** —Your ShoreTel administrator must enable this feature on the ShoreTel Mobility Router before you can use it on your mobile device. (Refer to the *ShoreTel Mobility Router Administration Guide* for more information.) After it is enabled on the router, you can turn on reverse dial on your device, as follows:
 - a. Select **Options > Call Settings**.
 - b. Scroll to and select **Reverse Dial**.
 - c. Select **Auto** (the default value), **On**, or **Off**.
 - d. Select **OK** to continue.
3. Select **Back** to return to the application main screen.

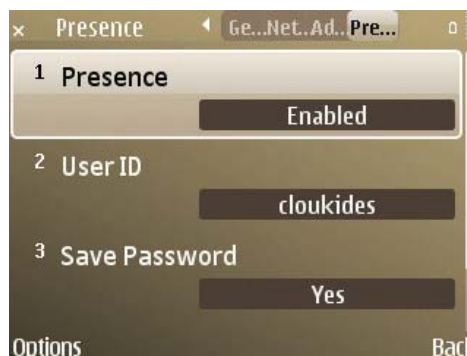
Changing Presence Preferences

You can change the following Presence preferences:

- Enable or disable Presence.
- Change the Presence User ID.
- Save the Presence password.
- Enable or disable Instant Message alerts.

To change Presence preferences:

1. Select **Options > Preferences**, and then scroll to **Presence** preferences.
2. To enable or disable Presence, select **Presence** and press the center key to toggle between **Enabled** and **Disabled**.



- To change the User ID, select **User ID** and press the center button to select the field.



- Enter the new **User ID**. Select **OK** to be prompted to enter a password and continue, or select **Cancel** to exit this screen without saving any changes.
- To specify if the user must save a password, select **Save Password** and use the center key to toggle between **Yes** and **No**.



- To enable/disable the audible tone when an Instant Messages pops up, select **IM Alerts**. Use the center key to toggle between **Enable** and **Disable**. The default is **Enable**.



Uploading Logs to the ShoreTel Mobility Router

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. You need a Wi-Fi or cellular data connection to upload troubleshooting logs. Alternately, you can email logs to ShoreTel Customer Support.

1. On the ShoreTel Mobility Client screen, enter **0123# SEND** to display the hidden **Debug** screen.



2. Set the following parameters on the **Debug** screen:
 - Enable Logging: **On**
 - Log Level: **Errors, Warnings, Info**
 - Components: **Call Control, Client, Comm Mgr, Trans Mgr, Config Mgr, FPData Mgr, Directory**
 - SipLog: **On**



3. Select **Back** to return to the main client screen. The client logs are now enabled for all calls made on this device.

Uploading Logs

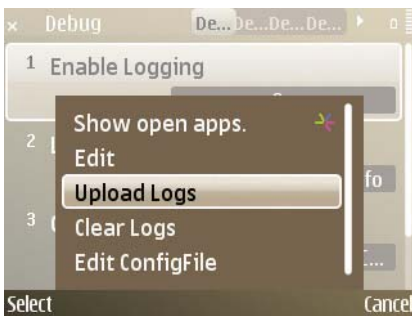
You can upload various types of logs to the ShoreTel Mobility Router. Note that instead of sending a log, you can also send a separate email to your support organization with your name and the details of the error, including what happened, time, of day, and other details.

To upload logs:

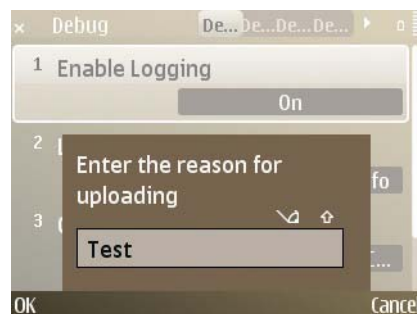
1. On the ShoreTel Mobility **Client** screen, enter **0123# SEND** to display the hidden **Debug** screen.



2. Select **Options > Upload Logs**.



3. Optionally, enter a brief description of the nature of the error.



4. Select **OK** to continue. The log is sent.
5. When you see a prompt to clear the log from the client, select **Yes** or **No**.



6. Select **Back** to return to the main screen.

