



Brilliantly simple™

# **ShoreTel User's Guide for Android®**

**Release 7.1**

July 2013

### **Document and Software Copyrights**

Copyright © 1998-2013 by ShoreTel Inc., Sunnyvale, California, USA. All rights reserved.

Printed in the United States of America. Contents of this publication may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without prior written authorization of ShoreTel, Inc. ShoreTel, Inc. reserves the right to make changes without notice to the specifications and materials contained herein and shall not be responsible for any damage (including consequential) caused by reliance on the materials presented, including, but not limited to typographical, arithmetic or listing errors.

### **Trademarks**

ShoreTel, ShoreTel (and logo), Brilliantly Simple, Brilliantly Simple Communication, ShoreGear, ShorePhone, and ShoreWare are registered trademarks of ShoreTel, Inc. in the United States and/or other countries. The ShoreTel logo is a trademark of ShoreTel, Inc. in the United States and/or other countries.

All other copyrights and trademarks herein are the property of their respective owners.

### **Patents**

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

### **Version Information**

ShoreTel Mobility User's Guide

Part Number: 850-1575-01

Version: 7.1

Date: July 2013

### **Company Information**

ShoreTel, Inc.

960 Stewart Drive

Sunnyvale, California 94085 USA

+1.408.331.3300

+1.408.331.3333 (fax)

[www.shoretel.com](http://www.shoretel.com)

# Table of Contents

---

About This Book	v
Online Knowledgebase	vi
<b>Chapter 1</b>	<b>Installing the ShoreTel Mobility Client Application</b> . . . . . <b>9</b>
Before You Begin	10
Connecting to a Wi-Fi Network	10
Installing & Provisioning the ShoreTel Mobility Client	10
Reprovisioning	13
Updating to the Latest ShoreTel Mobility Client	13
Uninstalling the ShoreTel Mobility Client	14
Using Your Mobile Device with the ShoreTel Dock	14
<b>Chapter 2</b>	<b>Getting Started</b> . . . . . <b>15</b>
The Mobility Client Application User Interface	15
Exiting The Mobility Client	17
<b>Chapter 3</b>	<b>Managing Calls</b> . . . . . <b>19</b>
Receiving Calls	19
Placing Calls	21
Using Personal Dial (Dual Persona™) Mode	22
Using Contacts and Recents to Place Calls from the ShoreTel Mobility Client	23
Using the Speaker	24
Muting a Call	24
Switching Between Calls	24
Transferring Calls	24
Managing Conference Calls	25
Changing the Network While on an Active Call	26
Accessing Voice Mail	26
Making Emergency Calls	27
<b>Chapter 4</b>	<b>Presence and Instant Message</b> . . . . . <b>29</b>
Presence Icons	30
Enabling Presence	31
Setting Presence Status	31

	Setting Location . . . . .	31
	Editing the Presence Message . . . . .	32
	Adding and Deleting Buddies . . . . .	32
	Setting a Buddy's Access Level . . . . .	33
	Viewing Buddy Details . . . . .	34
	Sorting the Buddy List . . . . .	34
	Creating Groups of Buddies . . . . .	34
	Adding a Buddy to a Group . . . . .	35
	Sending Instant Messages to Buddies . . . . .	35
	Logging In/Out . . . . .	39
	Sending Email to a Buddy . . . . .	39
	Calling a Buddy . . . . .	40
<b>Chapter 5</b>	<b>Secure Remote Access . . . . .</b>	<b>41</b>
	Before You Begin . . . . .	41
	Verifying that Secure Remote Voice Is Enabled . . . . .	42
	Verifying that Secure Enterprise Services Are Enabled . . . . .	42
<b>Chapter 6</b>	<b>Searching for People, Places, and Things . . . . .</b>	<b>45</b>
	Using the Corporate Directory outside of the Enterprise . . . . .	46
	Searching Buddies, IM History, and More . . . . .	46
	Searching the Corporate Directory . . . . .	46
	Creating a Favorite . . . . .	48
	Deleting a Favorite . . . . .	48
<b>Chapter 7</b>	<b>ShoreTel Mobility Client Settings . . . . .</b>	<b>49</b>
	Changing Common Settings . . . . .	49
	Changing Preferences . . . . .	50
	Changing Advanced Settings . . . . .	52
	Getting Help . . . . .	54
<b>Appendix A</b>	<b>Dialing from a Meeting Invitation, Calendar Appointment, or Email . . . . .</b>	<b>57</b>
	Enabling Calendar Conference Dialing . . . . .	57
	Dialing From a Calendar Event . . . . .	58
	Dialing From an Email Message . . . . .	58
<b>Appendix B</b>	<b>ShoreTel Communicator . . . . .</b>	<b>61</b>
	Enabling ShoreTel Communicator . . . . .	61
	Using Visual Voice Mail . . . . .	62
	Specifying Call Handling Mode . . . . .	63

# Before You Start

---

## About This Book

---

This guide is for people who use an Android phone 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
<b>Bold text</b>	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.
<b>Menu &gt; Command</b>	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>.

---

## 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:

<a href="#">Before You Begin</a> .....	10
<a href="#">Connecting to a Wi-Fi Network</a> .....	10
<a href="#">Installing &amp; Provisioning the ShoreTel Mobility Client</a> .....	10
<a href="#">Reprovisioning</a> .....	11
<a href="#">Updating to the Latest ShoreTel Mobility Client</a> .....	13
<a href="#">Uninstalling the ShoreTel Mobility Client</a> .....	14

### Before You Begin

---

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

- Data connection—See [Connecting to a Wi-Fi Network on page 10](#) 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).

- User name and password—user name and password required for authentication with the Mobility Router.
- 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.

## Connecting to a Wi-Fi Network

---

When you enable Wi-Fi on your mobile device, it scans for available Wi-Fi networks in the area. If the mobile device has never connected to an enterprise Wi-Fi network, choose the enterprise Wi-Fi network when prompted to connect to a Wi-Fi network. Depending on the Wi-Fi network, you might need to provide the appropriate security key to connect to the network.

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, use the following procedure. For more information about setting up a Wi-Fi access point, refer to the documentation for your mobile device.

### To set up a Wi-Fi access point on your mobile device:

1. From the Home screen, select **Settings > Wireless & networks > Wi-Fi Settings**.
2. Select the network and enter the name, password, and so on, if prompted.

## Installing & Provisioning the ShoreTel Mobility Client

---

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.

Make sure your device is connected to a Wi-Fi network before you begin.

1. When you receive an email message from either your ShoreTel Mobility administrator or from the ShoreTel Mobility Router, download and install the client, as follows:
  - From your mobile device on site—If you are on-site at your company, select the link in the email message to go directly to a web page which guides you through downloading and installing the client.
  - From your mobile device, remotely—Copy and paste the link from the email message into your mobile device's browser to go to a web site for instructions.



- From a computer—If you are reading the email message on your computer, use a QR code reader app on your mobile device to scan the QR code in the email message. You can download a free QR code reader app from the your mobile phone's app store.
2. After you install the ShoreTel Mobility Client, on your mobile device, select the provisioning link from the ShoreTel email message.
3. Follow the prompts to provision your mobile device.
4. If prompted, enter your enterprise 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 your location, 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.

5. After the successful installation of the ShoreTel Mobility Client, you are prompted with the message "ShoreTel Mobility Client would like to use your current location." Select **OK** to allow your geographical location to be identified, or **Don't Allow** to continue without allowing this functionality.
6. Open your Apps menu to locate the ShoreTel application icon and touch and hold it to move it to your home screen for easy access.

## 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. From the main ShoreTel Mobility screen, touch < to open the ShoreTel options menu.
3. Select **Settings > Advanced > Provisioning**.
4. Read and **Accept** the **Emergency Call Warning** page to continue. If you do not accept the Emergency Call Warning, the ShoreTel Mobility Client exits without provisioning.
5. If you are connected to your enterprise local Wi-Fi network, select **Next** and continue to the next step. Otherwise, enter your password and set **Remote Provisioning** to **ON** and select **Next**.

When you are provisioning remotely, for example not connected directly to your local enterprise Wi-Fi network, enter the public IP address and port number of the Mobility Router and select **Next** to continue.

6. Select **Replace an existing device** from the list of earlier provisioned devices. If more than one of your devices is provisioned against this Mobility Router, a list of your devices appears, with the Primary Device listed first during provisioning.
7. If you want to make this device the Primary Device, select **Yes**. The default is **No**. Select **Next** to continue.
8. Fill in the phone number of the iPhone in the Mobile Number field. The **Enterprise Extension** and **Enterprise Full Number** fields are populated from the ShoreTel Mobility Router.
9. Select **Next**.
10. Read the Provisioning message, and select **OK** to automatically exit the ShoreTel Mobility Client application.

## Updating to the Latest ShoreTel Mobility Client

---

When there is an update available for the ShoreTel Mobility Client, you are automatically prompted to update it when you restart the application.



### 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)."

---

You can also check for updates as follows:

1. From the ShoreTel Mobility options menu, touch **Settings > Help > About > Check for Updates**.
2. Touch **Check for Updates**. If an updated version of the ShoreTel Mobility Client is available, a popup appears with the version number. Select **OK** to continue, and then select **OK** to replace the application with the latest version.
3. Select **Install**.
4. Select **Open** to launch the ShoreTel Mobility Client, or select **Done** to launch the application at another time and return to the device home screen.

## Uninstalling the ShoreTel Mobility Client

---

You can uninstall the ShoreTel Mobility Client as follows:

1. From the Home screen, select **Settings > Applications > Manage applications**.



---

**Note**

Depending on your version of Android, you can also touch and hold the ShoreTel icon on the Applications menu screen and drag it to **Uninstall** to remove it from your mobile device.

---

2. Select **ShoreTel**.
3. Select **Force stop** to discontinue any services that may be running.
4. Select **Uninstall**.



# 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:

<a href="#">The Mobility Client Application User Interface .....</a>	<a href="#">15</a>
<a href="#">Exiting The Mobility Client.....</a>	<a href="#">17</a>

---

## The Mobility Client Application User Interface

When you first open the ShoreTel Mobility Client, you see the keypad screen. Swipe the screen right or touch < in the upper left corner to open the ShoreTel Mobility menu and choose from the following options:

- **Search**—Search your Favorites, Contacts, Recents, and more. Touch **Continue Search on Enterprise Directory** to search for a person in the enterprise directory.
- **Favorites**—View contacts marked as Favorites.
- **Contacts**—View the contact list.
- **Keypad**—Open the ShoreTel Mobility application and make calls.
- **Recents**—View the most recent activity in the call log.
- **Voicemail**—When ShoreTel Communicator is enabled, use the voice mail icon to access cellular and enterprise voice mail.
- **Buddies**—When Presence is enabled, display your status and location in the system, as well as the presence of others (aka “buddies”) configured in the enterprise and registered on the server.

- **Messages**—See your instant messages.
- **Today**—If enabled, access your calendar items for the day. Directly dial into conferences, if your calendar event has a phone number.
- **Settings**—Access the following settings and advanced options:
  - **Preferences**—Set your preferences for Call Handling, Data and Call Routing, Presence/IM, Voicemail, and Calendar.
  - **Advanced Settings**—View your mobile device’s configuration, access settings for Communicator, Setup, Provisioning, and Troubleshooting.



#### Note

Refer to [ShoreTel Mobility Client Settings on page 51](#) for details about these settings.

- **Help**—Get help, watch tutorial videos, and see version information about Mobility Client. For more information, see [Getting Help on page 57](#).

The following table lists the Mobility Client icons.

**Table 1: Mobility Client Icons**









Icon	Name	Description
	Mobility Application	You have installed the Mobility application.
	Enterprise Services	Your mobile device can use enterprise services, such as directory query.
	Enterprise VoIP	Your device can make VoIP calls using the enterprise Wi-Fi network.
	Not Registered	
	Wi-Fi Call	Your device can make VoIP calls using the enterprise Wi-Fi network.
	VoIP Call over Cellular Data	Your device can make VoIP calls using the cellular data network.
	Call	You have an active call.
	Instant Message	You have an active instant message.

Table 1: Mobility Client Icons (continued)

Icon	Name	Description
	Personal Dial	Personal Dial mode is on and active.
	Voice mail	You have voice mail.
	Available	Status is available.
	Busy	Status is busy.
	Unavailable	Status is unavailable.
	Do Not Disturb	Do Not Disturb is on.
	In a Meeting	Status is In a Meeting.
	On a Call	Status is On a Call.
	Unknown	Status is not known.
	Home	Location is Home.
	Work	Location is Work.
	On the Road	Location is On the Road.
	Custom	Status is a custom message.

## Exiting The Mobility Client

---

To exit the Client, touch < in the upper left corner to open the ShoreTel Mobility menu, and then touch **Exit**.



# 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:

Receiving Calls .....	19
Placing Calls .....	21
Ending an Active Call .....	22
Using Personal Dial (Dual Persona™) Mode .....	22
Using Contacts and Recents to Place Calls from the ShoreTel Mobility Client .....	23
Using the Speaker .....	24
Muting a Call .....	24
Switching Between Calls .....	24
Transferring Calls .....	24
Managing Conference Calls .....	25
Changing the Network While on an Active Call .....	26
Accessing Voice Mail .....	26
Making Emergency Calls .....	27

### 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—Slide the green answer bar to **answer** the call.
- Decline—Slide the red decline bar to **ignore** the call.

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:

- Slide the green Answer bar. 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 24.

### To decline a call while on another call:

- Slide the red **decline** bar.

To reject incoming calls before your device rings, select the native Android menu key > **Enable DND** and then select a length of time for Do Not Disturb to be active (**Off, Always On, 15 Minutes, 30 minutes, 1 Hour, 2 Hours, 4 Hours**). Select Disable DND to revert to allowing incoming calls to ring the device Your Presence status also changes to Do Not Disturb.

For more information on Do Not Disturb and other call settings, refer to [Changing Call Handling Preferences](#) on page 52.

You can also use other apps on your mobile phone while on a call. Just touch the Home key to put the ShoreTel Mobility Client into the background. To return to your call when you are done, touch the bar at the top of your screen.

### To forward calls:

- For information about switching between calls see [Changing Call Handling Preferences](#) on page 50.

## Receiving a Call while Paired with a Bluetooth Device

Bluetooth support for VoIP calling is an experimental and unsupported feature. You may experience unexpected behavior during VoIP calls when a Bluetooth audio device is connected.

## 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.

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 [Changing Data and Call Routing Preferences on page 51](#) for details.



### Note

After placing a call on the cellular network, the application moves to the background and the Android dialer application opens. Select the Android **Back** key to return to the ShoreTel Mobility Client.

---

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 27](#) 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. From the keypad screen, enter the phone number you want to call.
2. Touch the **Call** key or touch the **Call Using** key to the left of the Call key to select how you want to place the call (over **Wi-Fi**, **Cellular Voice**, or **Personal Dial**, for this call only).



### Tip

Without entering any numbers, if you tap the Call key twice, the keypad shows the last number you called.

---

## Placing an Active Call on Hold

Select **Hold** to put an active call on hold. **Unhold** displays while on Hold.

Select **Unhold** to make the call active again.



### Note

For cell calls on some CDMA devices, the **Hold** feature may not function properly.

---

**Note**

If the call you placed on hold is on the enterprise Wi-Fi network, and you move out of range of the network, the call becomes active again while the call is moved from the wireless to the cellular network. After the call is moved to the cellular network, the person that you were talking to can hear you.

## Placing a Call While on an Active Call

To make another call while on an active call:

1. Select **Hold**.
2. Select **Add call**. The dialpad becomes active.
3. Enter the new number. Select the green Call function. The first call displays as **OnHold** while the second call is active.

**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 24.

## Placing a Call while Paired with a Bluetooth Device

Bluetooth support for VoIP calling is an experimental and unsupported feature. You may experience unexpected behavior during VoIP calls when connected with a Bluetooth audio device.

## Ending an Active Call

Touch **End** to end an active call.

---

## 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

**Business Dial** is the default mode. To use **Personal Dial** for your current call only, from the keypad, enter the number you want to dial, and then touch the icon in the lower left corner. In the popup menu, select **Personal Dial**.

You can also touch your extension in the icon bar at the top, or select the Android menu key and select **Set Personal Dial** in the menu that pops up. The Personal Dial icon appears in the icon bar, and your cellular phone number replaces the extension number. You briefly see the message **Personal Dial is enabled**. Personal Dial mode stays on until you switch it off.

To disable Personal Dial and return to Business Dial mode touch your cellular phone number in the icon bar, or select the Android Menu to view a popup screen and select **Set Business Dial**. The Personal Dial icon disappears from the icon bar, and your extension replaces your cellular number. You briefly see the message **Business Dial is enabled**.

---

## Using Contacts and Recents to Place Calls from the ShoreTel Mobility Client

---

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

### Using Contacts to Place Calls

From the application main menu, select **Contacts**. Select the name of the contact and select the appropriate number (home, work, etc.).

## Using Recents to Place Calls

1. From the ShoreTel options menu, select **Recents**.
2. Select **All** to view all recent call activity, or select **Missed** to view only missed calls.
3. Select the number you want to call.

## Using the Speaker

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



### **WARNING!**

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

- Select **Speaker to** turn on the loudspeaker. The speaker button lights up.
- Select **Speaker** again to turn off the loudspeaker and resume speaking holding the device to your ear.

## Muting a Call

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

- Select **Mute** to mute a call. The mute button lights up.
- When on a call and muted, select the illuminated mute button to 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 **Swap**.

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 Data and Call Routing Preferences on page 51](#).



### Note

For calls that use cellular data, Transfer is disabled if two calls are on-going. Also for cellular data calls, on some CDMA devices, you may not be able to transfer calls.

1. During the active call, select **Transfer**. The call is put on hold.
2. Select **Move to my other device** or **Transfer to someone else**.
  - Select **Move to my other device** to transfer this call to your desk phone.



### Note

Depending on your IP PBX, if you have more than one device, the call rings all other devices. You can answer any of these other devices, including the desk phone. Contact your ShoreTel Mobility administrator for details about your IP PBX configuration.

- Select **Transfer to someone else** to transfer this call to a contact. Enter the contact's number or select **Contacts** and then the name of the contact from the list.



### Note

When transferring a call on the cellular network, the Android phone application displays the cellular access number and the number called to receive the transfer. Touch the Android **Back** key to return to the application.

## Managing Conference Calls

You can merge two VoIP calls into a conference.



### 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 participants.
2. While the call is active, touch **Add Call**. This call is put on hold.

3. Use the keypad to enter the number of the other conference call member, or select a Contact, Buddy, Favorite or Recent. Select **merge calls**.
4. Select **End** to end the session.



#### Note

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 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 [Changing Data and Call Routing Preferences on page 51](#) for more information.

### Changing from Wi-Fi to Cellular

1. After placing or receiving a call, touch **Menu > Handover**. The native phone dialer appears.

When you finish the call, touch the **Back** button to return to return to the ShoreTel Mobility application.



#### Note

If your call fails to connect more than once due to a weak connection, you are prompted to switch back to Wi-Fi.

### Changing from Cellular to Wi-Fi

1. When you receive a cellular call with a Wi-Fi or cell data (if enabled) network available, switch to the ShoreTel Mobility application using one of the following methods:
  - Use the notification bar
  - Use a shortcut on the desktop/home screen (if available)
  - Touch and hold the Home key to select the application from Recents
  - Touch Applications > **ShoreTel**.



#### Tip

The ShoreTel Mobility application may not automatically be added to the Home screen upon installation and therefore the application may be located in the Applications area.

2. Select **Use touch tone keypad** to return access the ShoreTel application.
3. Select the Android menu key > **Handover** to handover the call to Wi-Fi.



**Note**

To continue the call on the cellular network, drag down the notifications window and select the ShoreTel Mobility notification.

Touch the Android back button return to the application.

**Note**

If your call fails to connect more than once due to a weak connection, you are prompted to switch back to cellular data.

## 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

If ShoreTel Communicator features are enabled, refer to [Using Visual Voice Mail on page 62](#) to access visual voice mail. Visual voice mail allows you to view all (undeleted) voice mails at a glance, and enables you to choose which voice mail to listen to. Also see [Enabling ShoreTel Communicator](#) on page 61.

## Accessing Cellular Voice Mail

To access cellular voice mail:

1. Activate Personal Dial mode. See [Enabling/Disabling Personal Dial on page 23](#).
2. Touch and hold the **1** key on the keypad.

## Accessing Enterprise Voice Mail

To access enterprise voice mail:

1. Activate Business Dial mode, if it is not already active. See [Enabling/Disabling Personal Dial on page 23](#).
2. Press and hold the **1** key on the keypad.

If ShoreTel Communicator features are enabled, you can see and listen to individual voice mail messages in your enterprise voice mail using the voicemail tab. Refer to [ShoreTel Communicator](#) on page 61.

## 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:

Presence Icons .....	30
Enabling Presence .....	31
Setting Presence Status.....	31
Setting Location .....	31
Editing the Presence Message .....	32
Adding and Deleting Buddies.....	32
Setting a Buddy's Access Level .....	33
Viewing Buddy Details .....	34
Sorting the Buddy List .....	34
Creating Groups of Buddies.....	34
Adding a Buddy to a Group.....	35
Sending Instant Messages to Buddies.....	35
Logging In/Out.....	39
Sending Email to a Buddy.....	39
Calling a Buddy .....	40

## Presence Icons





The following table shows Presence status icons:

**Table 2: Status Description**

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

The following table describes location icons:

**Table 4: Location Description**

Description	Icon
Home	
Work	
On the Road	
Custom	

---

## 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 keypad, touch your connection status icon in the upper right.

Select < in the upper left corner of the main screen to open the ShoreTel menu, and then touch **Settings > Presence/IM**. Verify that **Presence** is set to **On**.

---



### Note

The **Presence User Name** can differ from the name used to provision the device. For example, if someone borrows your device, touch **Presence User Name** and enter that person's Presence user name.

To find out your Buddies's current status on the network, from the main ShoreTel options menu, touch **Buddies**.

---

---

## Setting Presence Status

---

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

1. Touch your own Presence icon at the top of the ShoreTel main menu to open the Common Settings menu.
2. Touch **Availability** to set your status.



### Note

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

---

---

## Setting Location

---

On your primary device, set your location to allow your buddies to view your location status, as follows:

1. Touch your own Presence icon at the top of the ShoreTel main menu to open the Common Settings menu.
2. Touch **Location** to set your location.

**Note**

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

## Editing the Presence Message

On your primary device, set an outgoing note from you that all of your buddies see, as follows:

1. Touch your own Presence icon at the top of the ShoreTel main menu to open the Common Settings menu.
2. Touch **Note** to enter a customized status message.
3. Touch **Update** to save your new status.

## Adding and Deleting Buddies

You can add or delete buddies.

### Adding Buddies

To add a buddy:

1. Select < in the upper left corner of the main screen to open the ShoreTel menu.
2. Touch **Buddies** to open your buddy list.
3. Touch the edit (pencil) icon, and then touch + in the lower left corner of the screen.
4. Begin typing the name or email address of your buddy as it is entered on the enterprise server and touch the Android search key to see a list of matching names.
5. Touch the name(s) to add to your buddy list.
6. Touch the Android menu key and select **Add** to add the name(s) to your buddy list.

**Note**

All buddies are automatically added to the **Other Contacts** group.

## Deleting Buddies

To delete buddies:

1. Select < in the upper left corner of the main screen to open the ShoreTel menu.
2. Touch **Buddies** to open your buddy list.
3. Touch the edit (pencil) icon, and then touch + in the lower left corner of the screen.
4. Select one or more buddies from the list.
5. Touch the trash can icon in the lower center of the screen to delete the buddy.

## Setting a Buddy's Access Level

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

**Table 5: Access Level Description**

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.
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



### 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 your buddy list, select a buddy's icon to the far right of the buddy name to see the Buddy Detail screen.
2. Touch the **Access Level** bubble to set the access level. (The bubble may already say an access level, such as **Company**.)
3. Select the appropriate access level from [Table 5 on page 33](#) to update your buddy's access level.

## Viewing Buddy Details

---

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



### Note

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

1. Touch **Buddies**.
2. Touch the person icon to the right of a buddy's name to view your buddy's detailed information.

## Sorting the Buddy List

---

Use the following steps to sort your buddies:

1. From your **Buddies** list, touch the Android menu button in the upper right.
2. Touch **Display Options**.
3. Set whether to sort buddies by **Name**, **Availability** or **Location**.
4. Filter buddies by **All Buddies**, **Online Buddies Only**, or **Offline Buddies Only**.

## Creating Groups of Buddies

---

You can create groups of Buddies. After creating a group, assign buddies to the group. Refer to [Adding a Buddy to a Group on page 35](#) for more information.

To create a group:

1. From your **Buddies** list, touch the edit (pencil) icon in the upper right.
2. On the Edit Buddies screen, touch the groups icon in the lower right.



3. Touch the edit (pencil) icon in the upper right.
4. Touch + and enter a group name.
5. Touch + to save the new group.

## Adding a Buddy to a Group

---

You can assign buddies to a group or groups.

Create a group before assigning a buddy to it. Refer to [Creating Groups of Buddies on page 34](#) for more information.

To add a buddy to a group:

1. From your buddies list, touch the person icon to the right of the buddy that you want to add to a group.
2. Touch **Group**.
3. Select the groups that you want your buddy to belong to, and then touch **OK**.

## Deleting a Group

To remove a group:

1. From your buddy's list, touch the edit (pencil) icon in the upper right.
2. On the Edit Buddies screen, touch the groups icon in the lower right.
3. From your groups list, touch the edit (pencil) icon in the upper right.
4. Select the group or groups you want to delete.
5. Touch the garbage can icon in the lower left to delete the group(s).
6. Select whether to remove just the group or both the group and all buddies in it. The group is delete.

## Viewing Notifications

When other people's activity affects you, you receive a notification. For example, when a buddy adds you to his/her buddy list, you receive a message.

To view and take action on notifications from buddies:

1. From your buddies list, touch the Android menu button in the upper right.
2. Touch **Notifications**. If you have notifications, the buddy or buddies who have performed an action that affects you directly displays.

3. Select the buddy name to view the notification.
4. Touch **Acknowledge** to confirm you have received the notification.
5. Touch **Add** to add this buddy to your buddy list.

**Note**

Or, you can touch the Android menu icon again and select **Acknowledge All** to address all notifications at once, or **Acknowledge & Add** to address all and add all buddies at once.

## 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 38.](#))

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.

## Viewing IM History

To set how long to keep IMs:

1. Select < in the upper left corner of the main screen to open the ShoreTel menu.
2. Select **Settings > Preferences > Presence/IM**.
3. Touch **IM History**, then select the amount of time to keep IMs.

## Enabling/Disabling IM Notifications

To enable/disable receiving notifications for new IMs:

1. Select < in the upper left corner of the main screen to open the ShoreTel menu.
2. Select **Settings > Preferences > Presence/IM**.
3. Select or deselect **New IM Notifications**.
4. Touch **IM Notification Ringtone**, then select a tone.

5. Touch **IM Notification Vibrate** to set your mobile device to vibrate when you receive a notification.

## Enabling/Disabling IM Preview

To enable/disable a preview of a new IM:

1. Select < in the upper left corner of the main screen to open the ShoreTel menu.
2. Select **Settings > Preferences > Presence/IM**.
3. Select or deselect **Message Preview**.

## Starting a Conversation

To start an IM conversation:

1. From your buddy list, select a buddy to open a chat window. (You can also touch **Messages** from the ShoreTel options menu to continue a previous conversation.)
2. Type a message to the buddy and touch the paper airplane icon to send the message.

## 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:

- Type your message and touch the paper airplane icon to send it.

## Open and Close Instant Message Conversations

You can open previous conversations to continue them.

- From the ShoreTel options menu, touch **Messages** to view all of your previous and current IM conversations.
  - Touch a conversation to open it and continue it, if you want.
  - When you are finished, press your phone's Back key to return to your messages list.

## 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 the Android menu button, then touch **Participants**.

2. Select one or more buddies from the list. The green “plus” next to the buddy’s name indicates you can add this buddy to the conversation. After selecting a buddy, the name appears in the participant field.
3. Select the Android menu button, then touch **Done**.

## 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 36](#). 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.

1. In an IM with more than one participant, select the Android menu button, then touch **Participants**.
2. Select one or more buddies from the list. The red X next to the buddy’s name indicates this buddy may be removed to the conversation. After removing a buddy, the name disappears from the participant field.
3. Select the native Android menu button, then touch **Done**.

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.

---

## 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 conversation, select the Android back key until you open the ShoreTel options menu.
2. Touch **Recents** to return a call, **Buddies** to call a buddy, or touch **Keypad** to dial a number.

If you select a buddy who has no configured numbers, the keypad screen opens. If only one number is configured, this number is automatically dialed. If multiple numbers are configured for this buddy, for example work and home, a popup screen displays. Choose a number from the popup screen. During a multi-party session, touch **Call** to display all participants' information. Select the participant you want to call, and continue as noted above.



#### Note

To call someone who is not on the buddy list, touch **Back** to return to the main application screen. Touch **Directory Query** or enter digits to place a call. Refer to [Searching for People, Places, and Things on page 47](#) for more details.

3. Touch the number or buddy name to call it, or enter a number using the keypad. The IM is still active.

## 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.

To send to an IM while on a call:

1. While on a call, select your mobile device's **Home** key.
2. Select the ShoreTel Mobility application.
3. To send a two-party message,
  - a. Select **Buddies**.
  - b. Select **IM**. Follow the standard Instant Message procedure to send an IM as described in [Starting a Conversation on page 36](#).
4. To send a multi-party message
  - a. Select **Buddies**.
  - b. Select **IM**. Follow the standard Instant Message procedure to send a multi-party IM as described in [Starting Multi-Party Conversations on page 37](#).

To respond to an IM while on a call:

1. While in a call, your mobile device vibrates, and pop-up appears if you receive an IM.
2. Select **Close** or **View**.

**Note**

To turn on or change the vibration setting, touch **Settings > Preferences > Presence/IM > IM Notification Vibrate**.

## IM Sessions

During an IM session, you can view active IMs, as follows:

1. From the ShoreTel options menu, touch **Messages**.
2. Touch a conversation to open it, or touch and hold it to choose from the following options:
  - **Send Message**—reopens the session.
  - **Close**—closes the session.
  - **Delete**—closes the session and permanently deletes it.

## Logging In/Out

Log off of the Presence server, as follows:

1. From the ShoreTel Mobility options menu, touch **Settings > Preferences > Presence/IM**.
2. Touch **Presence** to turn it **OFF**.

Log on to the Presence server, as follows:

1. From the ShoreTel Mobility options menu, touch **Settings > Preferences > Presence/IM**.
2. Touch **Presence** to turn it **ON**.

## 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. From the ShoreTel Mobility options menu, touch **Buddies**.
2. Touch the person icon to the right of the buddy's name.

If your buddy has an email address registered on the server, it appears in their buddy details.

3. Touch the email address to open your mobile device's email app and begin writing your email message.

---

## Calling a Buddy

---

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

1. From the ShoreTel Mobility options menu, touch **Buddies**.
2. Touch the person icon to the right of a buddy's name to see buddy details.
3. Select a configured **Work**, **Home** or **Mobile** number, depending on the numbers that your buddy has configured on the server.

## 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 Android Menu key.
2. Touch **Add Call**.
3. Select a number from **Recents**, or use the keypad to enter a number. The first call is placed on hold.





# 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 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:

<a href="#">Before You Begin</a> .....	41
<a href="#">Verifying that Secure Remote Voice Is Enabled</a> .....	42
<a href="#">Verifying that Secure Enterprise Services Are Enabled</a> .....	42

### 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 [Connecting to a Wi-Fi Network](#) on page 10 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 [Changing Data and Call Routing Preferences on page 51](#) 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 42](#) and [Verifying that Secure Enterprise Services Are Enabled on page 42](#).

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.

## 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 and the enterprise voice mail indicator when you see the following Secure Enterprise Services icon:





# CHAPTER

# 6

---

## 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:

Using the Corporate Directory outside of the Enterprise.....	46
Searching Buddies, IM History, and More.....	46
Searching the Corporate Directory.....	46
Viewing Directory Search User Information .....	47
Placing a Call Using Directory Search .....	47
Adding a Directory Search Match to Contacts .....	47
Adding a Favorite .....	50
Deleting a Favorite .....	50
Adding a Personal Contact .....	50

---

## 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 41](#).

---

## Searching Buddies, IM History, and More

---

You can search for names and numbers in your Buddies, IM history, recent calls, meetings, voice mail numbers and more.

To search using the ShoreTel Mobility client:

1. Select < in the upper left corner of the main screen, and then touch **Search** at the top of the menu.
2. Begin typing the name or number that you want to search for, and then select the magnifying glass to perform the search.
3. When you see a list of search results, touch an item to see its details.

---

## 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 < in the upper left corner of the main screen, and then touch **Search** at the top of the menu.

2. Begin typing the name or number that you want to search for in the corporate directory, then select the magnifying glass to perform the search.
3. Touch **Continue Search on Enterprise Directory**.

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.

## 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. Touch the name to see more 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 search results, select the person to see their details, including the numbers they have registered on the server.
2. Touch a number to call it.

## 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:

- Select a person from your search results to see their details, and then touch **+**.

## Adding a Favorite

---

To add a Directory Search contact to Favorites:

1. Search the directory for a person, as described in [Viewing Directory Search User Information on page 49](#).
2. Add the person to your contacts, as described in [Adding a Directory Search Match to Contacts on page 49](#).
3. After you add the person to your contacts, touch their name to see their details.
4. Touch the star to the right of the person's number to add the person to your favorites.

## Deleting a Favorite

---

1. From the ShoreTel Mobility options menu, touch **Contacts** and locate the contact you want to remove from your favorites.
2. Touch the contact to see the person's information.
3. Unselect the star next to the person's number to remove them from your favorites.

## Adding a Personal Contact

---

When you mark a contact as Personal, calls that you make to or from that contact use the native cellular network, bypassing the Mobility Router. Complete the following steps to add a contact as personal:

1. Select **Contacts** and choose a contact.
2. Select and hold the contact name to view a popup of options.
3. Select **Add as personal**. When you select this option, all calls to and from the contact are considered personal and are not routed through the Mobility Router.
4. Press the contact name and hold again for the option to **Remove from personal**.



# CHAPTER

# 7

---

## ShoreTel Mobility Client Settings

You can modify preferences and advanced ShoreTel Mobility Client settings.



---

### 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:

Changing Common Settings .....	49
Changing Preferences .....	50
Changing Advanced Settings.....	52
Getting Help .....	54

---

## Changing Common Settings

You can view some of the most commonly used settings by touching your Presence icon at the top of the keypad or the top of the ShoreTel options menu. You can change the following common settings:

- **Presence**—Change your **Availability** or **Location**. You can also add a custom message by touching **Note**.

- **Call Handling**—Select options, such as **Do Not Disturb**, **Personal Mode**, **Data and Call Routing** (for Wi-Fi or cellular data networks), or **Connection Status** to check how you are currently connected. For details, see [Changing Data and Call Routing Preferences on page 51](#).
- **Communicator**—Set your **Extension Assignment** to specify an alternate phone number you can use to answer calls coming into your ShoreTel extension or **Call Handling Mode** (for example, **Standard**, **In a Meeting**, **Out of Office**, **Extended Absence**, or **Custom**).

## Changing Preferences

---

You can modify the following preferences:

- Set how to handle your calls.
- Set how to route your calls and data.
- Change Presence or IM status.
- Change or verify voice mail numbers.
- Set calendar options for dialing conference calls.

### To change preferences:

Select < in the upper left corner of the main screen, and then touch **Settings > Preferences**, and choose from the following settings:

- **Call Handling**—Set all of your call handling preferences, such as personal dial, call forwarding, and transfer options. For more information, see [Changing Call Handling Preferences on page 52](#).
- **Data and Call Routing**—Set whether to use Wi-Fi (when available), cellular data, and cellular roaming. For more information, see [Changing Data and Call Routing Preferences on page 53](#).
- **Presence/IM**—Set your Presence so your buddies can find you. Also set your IM notifications. For more information, see [Changing Presence/Instant Message Settings on page 54](#).
- **Voicemail**—Set or verify your enterprise and cellular voice mail numbers.
- **Calendar**—If enabled, you can select a conference phone number in your daily calendar to directly call into a conference. For more information, see [Appendix A, Dialing from a Meeting Invitation or Calendar Appointment](#).

## Changing Call Handling Preferences

You can change ShoreTel Mobility call settings. Select < in the upper left corner of the main screen, and then touch **Settings > Preferences > Call Handling** and choose from the following settings:

- **Do Not Disturb**—Select **On** to set your desk phone to ring for all incoming calls and the mobile device not to ring. To revert to allowing incoming calls to ring the device, select **Off**.

- **Forward call to VM**—Select to indicate all incoming calls are immediately forwarded to voice mail. Incoming calls to your enterprise phone number do not ring on your desk phone or mobile device.
- **Forward call to Number/Call Forward Number**— Enable **Forward Call to Number**, then select **Call Forward Number** to enter the phone number. Select **OK**.
- **Transfer to Desk Number**—By default, the extension of your enterprise phone number is used when transferring an active call from your mobile device to your desk phone. Select this option to enter a different desk phone number. Select **OK**.

If the telephony system 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.

- **Reverse Dial**—In cases where Wi-Fi is unavailable, this parameter controls whether the call is initiated from the mobile device or from the ShoreTel Mobility Router.

In cases when it is cheaper to call from a landline rather than placing a call from a mobile device, the Reverse Dial setting helps control costs. Normally, outbound calls are dialed from the mobile device. When in Reverse Dial, outbound calls are placed from the ShoreTel Mobility Router to the mobile device. You still enter the number to be dialed as normal, however, based upon your settings, the system determines how to place the call.

- **On**—Reverse Dial is always used when not on Wi-Fi. When you make a call in this mode, the system calls you. A popup prompts you to answer. Select **Answer** to continue. Note that even though it appears you dialed an outbound call, the system “reverses” this action and calls you instead. You are prompted to select any number on the keypad to continue.
- **Off**—Reverse Dial is never used. Calls initiated in this mode are always treated as standard outbound calls.
- **Auto**—When there is no Wi-Fi available, Reverse Dial mode is always used when out of your home country, and never used when in your home country. When you make a call in this mode outside of your home country, the system calls you. A popup prompts you to answer. Select **Answer** to continue. Note that even though it appears you dialed an outbound call, the system “reverses” this action and calls you instead. You are prompted to select any number on the keypad to continue.

## Changing Data and Call Routing Preferences

1. Select **<** in the upper left corner of the main screen, and then touch **Settings > Preferences > Data and Call Routing**.
2. For Allowed Data Networks, choose from the following options:
  - **Wi-Fi**—When enabled, you can use Wi-Fi networks to connect to the ShoreTel Mobility Server. If Wi-Fi is enabled and connected, the Wi-Fi network is used instead of cellular data whenever possible.
  - **Cellular Data**—When enabled, you can use a cellular data connection to the ShoreTel Mobility Server. (Your account has to be enabled for cellular data access on the ShoreTel Mobility Router.)

- **Cellular Data Roaming**—When enabled, a cellular data connection may be used also while roaming. (Your account has to be enabled for cellular data roaming on the ShoreTel Mobility Router.)
3. For Call Routing Preferences, choose from the following options:
    - **Wi-Fi**—Use Wi-Fi networks for voice calls whenever possible.
    - **Cellular Data**—Make voice calls using a cellular data connection. Voice calls over cellular data require a 3G or faster data connection.
    - **Cellular Voice**—Place enterprise calls as cellular voice calls when you cannot use a data connection. 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.
    - **Cellular Data Roaming**—Place voice calls using a cellular data connection, including when roaming. This option is only available if your account has been enabled for cellular data roaming on the ShoreTel Mobility Server.
    - **Cellular Voice Roaming**—Place enterprise calls as cellular voice calls, including when roaming. This option is only available if your account has been enabled for cellular voice roaming on the ShoreTel Mobility Router. Disable this option to avoid incurring cellular voice costs when travelling to other countries.
  4. Select **Preferred Wi-Fi Connection** to view a list of configured access points. Select **Any** to automatically select an access point or **Preferred network** to manually select an access point. Select an access point from the list and touch **Save**.

## Changing Presence/Instant Message Settings

1. Select < in the upper left corner of the main screen, and then touch **Settings > Preferences > Presence/IM**.
2. 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.
3. Touch **IM History**. Select the appropriate option for the amount of history you want to display.
4. Toggle **IM Notification Ringtone, On/Off**.
5. Toggle **IM Notification Vibrate, On/Off**. Toggle **ON** if you want to be alerted about new IMs with a sound.
6. Toggle **Message Preview** to **On** to view a preview window of the IM.

## Changing Advanced Settings

---

You can modify the following advanced settings:

- View general configuration settings.
- View ShoreTel Communicator settings.
- View or change your Client setup.
- Reprovision a new or changed device.
- Set up calling from a calendar event.
- Turn on logging to help with troubleshooting.

### To change advanced settings:

Select < in the upper left corner of the main screen, and then touch **Settings > Advanced**, and choose from the following settings:




- **Configuration**—Verify the settings. These fields are read-only and can only be changed by re-provisioning the device.
- **ShoreTel Communicator**—Set up ShoreTel Mobility Communicator options. See [Changing ShoreTel Communicator Settings](#) on page 56 for more information.
- **Setup**—Choose from the following setup options:
  - **Auto start on reboot** is enabled by default. Select/deselect the checkbox to control the application startup behavior when the phone is rebooted.
  - **Keep screen on during call** is enabled by default. Turning on this option prevents the screen from locking while on a call.
  - Select **Disable** to disable the application. The application will shutdown. Launch the application and select **Enable**.
  - Disabling the application does not prevent you from receiving enterprise calls. When the application is disabled, incoming enterprise calls may still connect to your device as cellular voice calls.
  - To stop receiving enterprise calls on your device, your device must be removed from the ShoreTel Mobility Router configuration. Contact your system administrator.
  - **Bluetooth Headset** is disabled by default. Select/deselect the checkbox to enable or disable Bluetooth on VoIP on supported devices. **Note:** If your device does not support Bluetooth on a VoIP call, this feature is unsupported. Bluetooth support for VoIP calling is an experimental and unsupported feature. You may observe unexpected behavior during VoIP calls when a Bluetooth audio device is connected.
  - Select **Primary Device** to change the setting to **Yes** and to make this device primary. **Refer to [Reprovisioning on page 11](#)** for more information about Primary Devices.

- Select **Synchronize** configuration to synchronize with the ShoreTel Mobility Router.
- **Provisioning**—You do not need to reprovision a device unless you get a new one, switch between devices that use the same User ID, or unless your ShoreTel Mobility user account gets deleted from the Mobility Router. After you install the ShoreTel Mobility application, you can reprovision the device. See [Provisioning](#) on page 56 for more information.
- **Troubleshooting**—If you have problems, you can upload various types of logs to the ShoreTel Mobility Router. Turn Enable Logging ON and select either Upload or Send log via email. For the type of logging to use, contact your ShoreTel Mobility administrator for advice. See [Troubleshooting](#) on page 57 for more information.

## Changing ShoreTel Communicator Settings

You can use the following ShoreTel Communicator features when they are enabled. (Refer to [ShoreTel Communicator](#) on page 61 for more information about enable the features.

**Table 5: ShoreTel Communicator Functions**

Function Name	Icon	Description
Extension Assignment		Provides a list of phone numbers that you can use as alternate numbers instead of your desk phone for routing incoming calls.
Visual Voice Mail		Displays the number of voice mail messages in the voice mailbox, and displays textual information of messages, such as date, time and duration.
Call Handling Mode		Changes the call handling mode on the ShoreTel Mobility client.

1. Select **<** in the upper left corner of the main screen, and then touch **Settings > Advanced > ShoreTel Communicator**.
2. Enable or disable ShoreTel Communicator.
3. Touch **User Name** to enter a different user name or extension/ID, then touch **OK**.

## Provisioning

After installing the application, you can reprovision the device. You do not need to reprovision unless you get a new mobile device, switch between devices that use the same User ID, or your ShoreTel Mobility user account gets deleted from the Mobility Router.

Select **<** in the upper left corner of the main screen, and then touch **Settings > Advanced > Provisioning**. Refer to [Reprovisioning on page 11](#) for instructions.

---

## Troubleshooting

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. Select **<** in the upper left corner of the main screen, and then touch **Settings > Advanced > Troubleshooting**.
2. **Logging** is enabled by default. Select or deselect the appropriate options, then select **Upload log**.
3. Optionally, enter a brief description of the nature of the error in the **Subject** field. Select **OK**.
4. The log is uploaded. Select **OK** to clear the log.

## Getting Help

---

The ShoreTel Mobility Client has help topics and tutorials available to help you if you have questions or problems.

To get help:

1. From the ShoreTel Mobility options menu, touch **Help**.
2. Choose one of the following options:
  - **Help Screens**—See the overlaid tips and pointers when you look at the main client screens.
  - **Tutorial Videos**—Watch videos for some of the main features of the client.
  - **Contacting Support**—Select **On** to enable your device to call your support center. . You may optionally view the support center's contact information, and/or send an email with an attachment of the issue's log file. In this case, touch **Send Log**. Your device's email application automatically pops up with the log information populating the email. Send the email to complete the operation.
  - **About**—See what version of the client you have. Check to see if updates are available.





# APPENDIX

# A

---

## Dialing from a Meeting Invitation or Calendar Appointment

With the ShoreTel Mobility Client, when you receive a meeting invitation or email message with a link (or URL), you can select the link to join the conference. You can also dial extension digits to an automated attendant, in the following situations:

- Your device is connected to a corporate/enterprise Wi-Fi network.
- You are connected to a cellular network or remote Wi-Fi network *and* you are registered to the Mobility Router for secure enterprise features.

### Enabling Calendar Conference Dialing

---

When you first start up the ShoreTel Mobility Client after installing it, you may be prompted to access your calendar and turn on your Today screen. Accessing your calendar lets you view your meetings and dial in to meetings.

If you did not turn on your Today screen so you can see your calendar, you can turn it on later, as follows:

1. From the ShoreTel Mobility options menu, touch **Settings** > **Preferences** > **Calendar**, and then set **Calendar Conference** to **ON**.

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

## Dialing From a Calendar Event

---

After you accept a meeting invitation, it appears on your Today screen.

### To dial from a calendar event:

1. From the ShoreTel Mobility options menu, select **Today** to see a list of your next appointments.  
  
If the meeting or appointment has dial-in information, such as a phone number and passcode, you see a **Join** button next to it. If the meeting starts within the next 15 minutes, the Join button is green.
2. Select **Join** to call into the meeting. The conference passcode is automatically entered.

# APPENDIX

# B

---

## ShoreTel Communicator

ShoreTel Mobility supports the following ShoreTel Communicator features when ShoreTel Communicator for Mobile is enabled:

- Extension Assignment—Provides a list of phone numbers that can be used as an alternate to a desk phone for incoming calls.
- Visual Voice Mail—Displays the number of voice mail messages and information such as date, time and duration, and allows you to listen to voice mail messages.
- Call Handling Mode—Changes the call handling mode on the ShoreTel Mobility client.

### Enabling ShoreTel Communicator

---

To enable ShoreTel Communicator when your Communicator credentials are different from your ShoreTel Mobility credentials, refer to [Changing ShoreTel Communicator Settings](#) on page 53. In most cases, your ShoreTel Communicator and Presence server's user name and password are the same, enabling Communicator to automatically log on.

### 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 route all incoming calls to the ShoreTel extension 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. All additional EAs that you define in ShoreTel Communicator display on the ShoreTel Mobility Client. **Set EA** in the ShoreTel Mobility Client selects/enables the active EA.

Use the following steps when ShoreTel Communicator is enabled.

To select an Extension Assignment:

1. From the ShoreTel Mobility options menu, touch your own information at the top of the menu to open Common Settings.
2. Touch **Extension Assignment**.
3. 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”.

When anything other than Primary Phone is set, you will not receive incoming enterprise calls on your mobile device.

## Using Visual Voice Mail

When you receive a voice mail message, select **Voicemail** from the ShoreTel Mobility options menu to play and manage voice mail messages. A number indicates how many unheard messages you have. In your voice mail list, a message that you have not listened to appears in bold. After you listen to it, it is no longer bold. You can return the call or delete the message.

When in Business Dial mode, you automatically access the corporate voice mail system. When in Personal Dial mode, you access the native voice mail system. Refer to [Using Personal Dial \(Dual Persona™\) Mode on page 23](#) for more information on Business Dial mode and Personal Dial mode.

**Note**

Visual Voicemail is not available for the Extension Only user.

## Checking Voice Mail

When ShoreTel Communicator is enabled, check your visual voice mail as follows:

1. From the ShoreTel options menu, select **Voicemail**.
2. Select/highlight a voice mail message from the list.

Select this message again (play button) to hear the voice mail. You can play, pause, or re-listen to a voice mail message. If you receive a call in the middle of listening to a message, the message pauses until you are finished with the call. If you leave the voice mail screen during message playback, the messages pauses until you return to the screen. Note that you cannot check voice mail during a VoIP call.

## Returning a Message

If a caller is one of your contacts or has caller ID enabled, you can call them back when they leave you voice mail message.

To return a call from a voice mail message:

1. Select the voice mail message from the list.
2. Touch **Call Back**.

## Deleting Messages

To delete a voice mail message:

1. Select a voice mail message from the list.
2. Touch **Delete**.

## Specifying Call Handling Mode

Call Handling Mode sets how to handle your 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 you select Custom. 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:

3. From the ShoreTel Mobility options menu, select **Settings > Preferences > Call Handling**. Select the mode you want. A check mark indicates your current mode.



### Note

Selecting **Out of Office** sends all calls directly to voice mail without ringing your phone.

