ShoreTel

Brilliantly simple ™

ShoreTel User's Guide
for BlackBerry®

Release 7.1

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Company Information

ShoreTel, Inc.

960 Stewart Drive

Sunnyvale, California 94085 USA

+1.408.331.3300

+1.408.331.3333 (fax)

www.shoretel.com

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Before You Start

About This Book

This guide is for people who use BlackBerry 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.
Italic text	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.

Note

You can access the ShoreTel Mobility Client features and settings using either the keypad buttons or the virtual keyboard on touchscreen devices. Procedures may vary slightly depending on your device.

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

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).

- 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.

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 security key to connect to the 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.

- If the mobile device did not detect the Wi-Fi network that you want to connect to, manually add the Wi-Fi network on your mobile device. For more information, see the documentation for your mobile device.

- The following instructions may differ slightly depending upon your BlackBerry device.

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)

BlackBerry OS 6 and Earlier

To set up a Wi-Fi access point on your mobile device that uses BlackBerry OS 6 or earlier, use the following procedure. For more information about setting up a Wi-Fi access point, refer to the documentation for your mobile device.

Note

If you are using a Hidden Network, contact ShoreTel Customer Support.

1. From the Home screen, select the **BlackBerry button** > **Manage Connections** > **Set Up Wi-Fi Network**.

2. Read the information and select **Next**.

3. Select **Scan for Networks**, and then select the appropriate network**.**

4. Select **Next**.

5. In the **Security Type** field, select the appropriate authentication method for your WLAN infrastructure.

6. Enter the appropriate authentication key, if required. (If you are unsure which form of authentication, data encryption, or network key to use, contact your network administrator.)

7. Select **Connect** > **Next**.

8. If an automatic connection has not been established, choose the WLAN you just added and select **Connect**.

Note

When you are configuring the Wi-Fi settings for the enterprise SSID that you will use for voice calls, you must enable the **Allow inter-access point handover** option (which is disabled by default). Inter-access handover is required to enable AP-to-AP roaming while walking through your office. If inter-access handover is not enabled, then you will encounter excessive cellular voice usage while inside the enterprise.

9. Select **BlackBerry button** > **Manage Connections** > **Wi-Fi Options**

10. Select the appropriate Wi-Fi connection and select **Edit.**

11. Check **Allow inter-access point handover.**

BlackBerry OS 7 and Later

To set up a Wi-Fi access point on your BlackBerry OS 7 or later mobile device, use the following procedure. For more information about setting up a Wi-Fi access point, refer to the documentation for your device.

1. From the Home screen, select **All** > **Manage Connections** > **Wi-Fi Network**.

> **Note**
>
> If you are using a Hidden Network, contact ShoreTel Customer Support.

2. Select the appropriate network**.**

3. Enter the **Username** and **Password** used to access the network. In the **Security Type** field, select the appropriate authentication method for your WLAN infrastructure.

4. Enter the appropriate authentication key, if required.

> **Note**
>
> If you are not sure which form of authentication, data encryption, or network key to use, contact your system administrator.

5. Select **Connect**.

6. If an automatic connection has not been established, choose the WLAN you just added and select **Connect**.

> **Note**
>
> When you are configuring the Wi-Fi settings for the enterprise SSID that you will use for voice calls, you must enable the **Allow inter-access point handover** option (which is disabled by default). Inter-access handover is required to enable AP-to-AP roaming while walking through your office. If inter-access handover is not enabled, then you will encounter excessive cellular voice usage while inside the enterprise.

Installing the ShoreTel Mobility Client Application

You can download and install the ShoreTel Mobility Client using either of the following methods:

- A direct URL link to the ShoreTel Mobility Router. Follow the procedure in Installing the Client using the ShoreTel Mobility Router URL on page 12.

- The Desktop Manager. Follow the procedure in Installing the Client using the BlackBerry Desktop Software on page 13.

Installing the Client using the ShoreTel Mobility Router URL

1. On the BlackBerry device, start a Web browser and access the ShoreTel Mobility Client by entering 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).

Note

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 Client.

2. Select the link corresponding to the Mobile OS installed on your device to download the latest version of the ShoreTel Mobility Client.
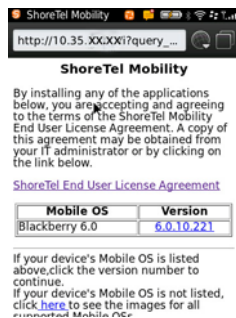
3. Select the check box for **Set Application Permissions**, and then select **Download**.

4. Set all permissions to **Allow**. Select the **BlackBerry** button > **Save** to save permissions.
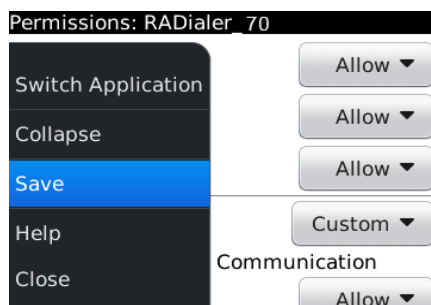
The application downloads and installs to your mobile device.

5. If prompted with Application Permissions Request, ensure all resources are selected and select **Save**.

6. If prompted **Would you like to grant ShoreTel Trusted Application status?**, select **Yes**.

7. Reboot the device if prompted.

8. Proceed to .

Installing the Client using the BlackBerry Desktop Software

If there is an older version of the ShoreTel Mobility Client on your mobile device, remove it before using the following steps to install the client:

1. Copy the radialer.alx and radialer.cod files onto a PC that has BlackBerry Desktop Software.

2. Connect the BlackBerry to the PC (typically via USB connector).

3. Launch the BlackBerry Desktop software on your PC.

4. Select **Applications** to display the applications installed on the device.

5. Select **Import Files**, select the radialer.alx file, and click **Open**.

   The ShoreTel Mobility Client **Status** column displays **pending installation**.

6. Select **Apply** to install the application.

7. Click **Finish**.

8. Before proceeding with provisioning the device, close the ShoreTel Mobility Client application by selecting **BlackBerry button** > **Close**.

9. Press the **BlackBerry button** > **Settings** > **Options**.
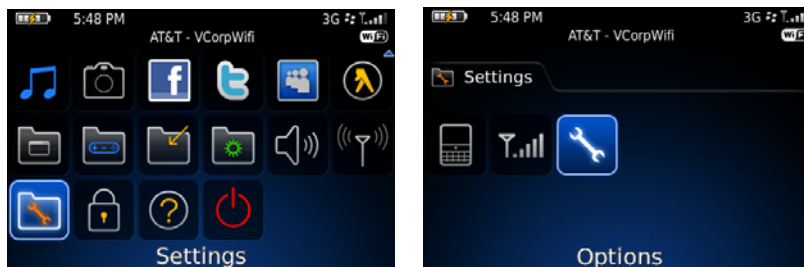
10. Select **Advanced Options** > **Applications**.
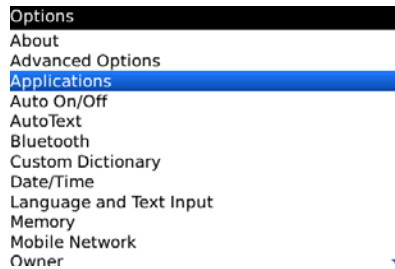
11. Select the **ShoreTel Mobility Client**, press the **BlackBerry button** > **Edit Permissions**.

12. Set all permissions to **Allow**. Press the **BlackBerry button** > **Save**.

> **Note**
> If you are using BlackBerry OS 7, you can access application permissions by pressing **Options** > **Device** > **Application Management** > **RAdialer** > **Edit Permissions.**

13. If the image is not signed, read the confirmation message and select **Yes**.

14. Reboot the device if prompted.

15. Proceed to Provisioning the Device on page 15.

Provisioning the Device

Note

Before provisioning your mobile device, be sure you know your mobile device/SIM phone number.

Also, verify the device has a data connection prior to proceeding. When the device has a data connection, the Wi-Fi icon on the Home screen appears white.

- If correctly connected to the cellular data network using a non-3G/4G device, the word **EDGE** is lit in all caps (lower case indicates there is no data connection). To enable EDGE, from the Home screen, select **Manage Connections** > **Mobile Network Options** and select **ON**.

- If correctly connected to the cellular data network using a 3G device, **3G**, **4G**, and the BlackBerry symbol are displayed. To enable 3G/4G, from the Home screen, select **Manage Connections** > **Mobile Network Options** and select **ON**.

1. From the Home screen on your BlackBerry, select **Applications** > **ShoreTel**.

2. 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.

3. Enter the following information:

    - **Mobility Router Address**: Type the IP address or fully qualified domain name (FQDN) of the 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**: The username is usually the username 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.

    - **Password**: Type the password for your user account. 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 password for that user account. See your administrator for the password for the local user account.

    - **Remote Provisioning:** If you are connected directly to the enterprise network (using the enterprise Wi-Fi network, or via the BlackBerry Enterprise Server), do not select **Remote Provisioning**. Select **Next** and continue to the next step. If you are not connected directly to the enterprise network, select **Remote Provisioning.** The **Remote Server Address** and **Remote Server Port** fields display. Enter the public IP address in the **Remote Access Server Address** field and the port number in the **Remote Access Server Port** field and select **Next**.

4. Select **Add as a new device** or if reprovisioning, **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 displays, with the Primary Device listed first during provisioning. You can choose to add this as a new device, or to replace a previously provisioned device shown in the list.

> **Note**
>
> You can provision more than one device (per user) based on the number of devices configured on the Mobility Router. Contact your ShoreTel Mobility administer if you encounter a conflict. Typically, the device that you carry the most is your Primary Device. You can use any of your devices to make or receive calls, instant messages, and more, but the router uses your Primary Device to determine your location (for example, if you are in the office, on the road, available, away, and so on).

5. To make this device the Primary Device, select **Yes**. The default is **No**. Select Next to continue.

6. Select **Submit**. The **Mobile Number** is automatically filled in. **Enterprise Extension** and **Enterprise Full Number** fields are populated from the ShoreTel Mobility Router. Select **Ok** to reboot.

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

8. If Presence and/or ShoreTel Communicator features are enabled, and your credentials cannot be automatically determined, you will also be prompted for Presence and/or Communicator username/password. Enter the corresponding credentials and select Save password to avoid being prompted again.

> **Note**
>
> You can change the preferred Wi-Fi connection or add other wireless networks as preferred connections. For more information, see Changing Network Preferences on page 58.

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. Connect the device to the BlackBerry Internet Service (BIS) or the BlackBerry Enterprise Server (BES). Use the BES to control all permission settings locally on the device itself. Contact your system administrator if you are not sure your device is BES-connected.

3. To begin reprovisioning your mobile device, from the ShoreTel Mobility Client main screen, select **BlackBerry button** > **Re-Provision**

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.

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:

1. When prompted to install the latest version of the ShoreTel Mobility Client, select one of the following actions:

- If the prompt indicates that the upgrade is required, select **Yes** to upgrade to the latest software. Go to Step 2.

- If the prompt indicates that the upgrade is recommended or asks whether you want to upgrade, select one of the following:

    - **Yes**—Upgrade to the latest software. Go to Step 2.
    - **No**—The Phone screen becomes active again.

2. The ShoreTel Mobility Client downloads the new version and then removes the old version. Select **OK** to reboot.

3. To manually check for the ShoreTel Mobility Client updates, select **BlackBerry button** > **Check for Updates**.

    If a new version of the ShoreTel Mobility Client is found, a prompt appears, asking whether you would like to upgrade to the new version.

    If no new version is found, a message stating that you have the latest version of the ShoreTel Mobility Client appears. Select **OK**.

> **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)."

1

Uninstalling the ShoreTel Mobility Client

You can uninstall the ShoreTel Mobility Client as follows:

1. Navigate to your Applications.

2. Scroll to **ShoreTel Mobility Client**.

3. Select the **BlackBerry Button**.

4. Select **Delete**.

5. When prompted to confirm the deletion, select **Yes**.

6. When prompted to reboot the mobile device, select **OK**. After rebooting, the application is uninstalled.

You may need to restart your mobile device.
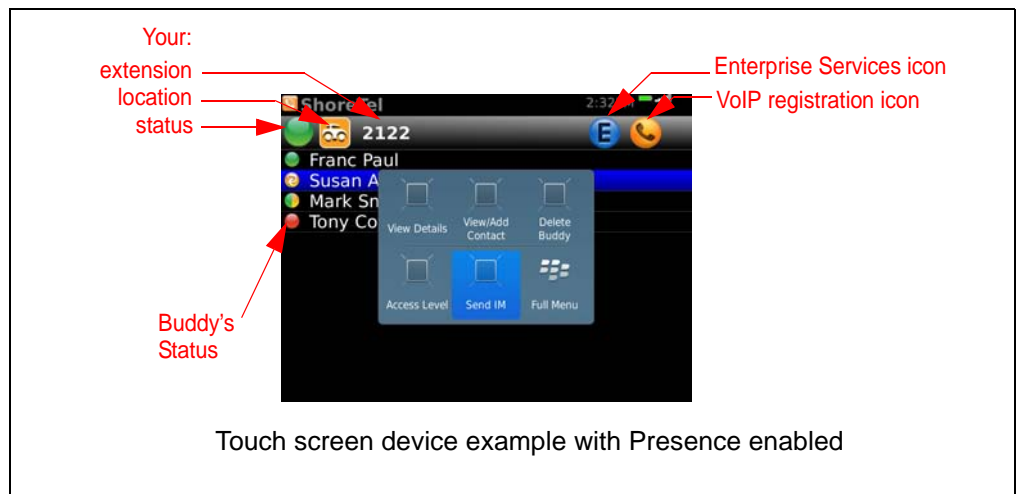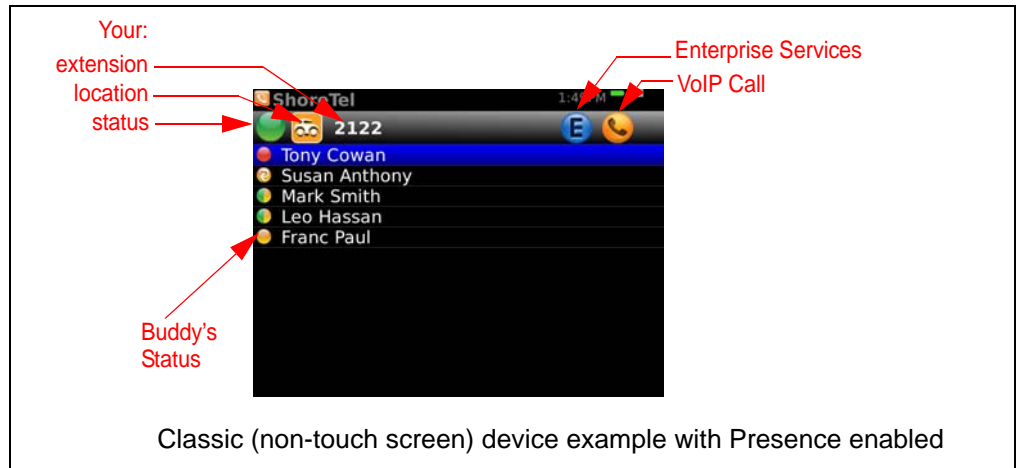
CHAPTER

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:

The Mobility Client Application User Interface

When you have a local connection, the ShoreTel Mobility Client appears as follows on your device's main screen:

Your:
extension
location
status

Enterprise Services
VoIP Call

Buddy's
Status

Classic (non-touch screen) device example with Presence enabled

Your:
extension
location
status

Enterprise Services icon
VoIP registration icon

Buddy's
Status

Touch screen device example with Presence enabled

Note

The VoIP registration icon indicates that VoIP is available but does not guarantee that all calls you make and receive use Wi-Fi. The Mobility Client determines whether to route a call using Wi-Fi or cellular data networks based on the signal strength of the enterprise Wi-Fi network and other parameters.

Note

You can access the Mobility Client features and settings using either the keypad buttons or the virtual keyboard on touch-activated devices. Procedures may vary slightly depending upon your device.

When the Mobility Client is active, press the **BlackBerry button** to see the following options:

- **IM Conversations**—View active and recent IM conversations.

- **Preferences**—Set General, Network, and Advanced settings for the Mobility Client.

- **Presence Options**—See all the operations related to Presence including login/out, change Presence account information, sorting buddies, configuring buddy display options, adding buddy, searching for buddy, deleting buddies, and changing instant message related settings.

- **Do Not Disturb**—Set DND to automatically send calls to Voice Mail.

- **Call Settings**—Set Mobility Call Settings including call forwarding, do not disturb and transfer to desk.

- **Connect/Disconnect Wi-Fi**—Connect or disconnect from the Wi-Fi network.

- **Set Personal Dial**—When enabled, you can place the next call directly over the cellular network with the phone number of the SIM as the caller ID. This option toggles between **Business Dial** and **Personal Dial**.

- **Voice Mail**—Access cellular and enterprise voice mail, and visual voice mail if ShoreTel Communicator Features are enabled.

- **Call Handling Mode**—When ShoreTel Communicator Features are enabled, specify the call handling mode you want to use.

- **Extension Assignments**—Specify an alternate phone number you can use to answer calls coming into your ShoreTel extension.

- **Directory Search**—Search for a user in the enterprise directory.

- **Add to Contacts**—Add a user to the contact list.

- **Re-Provision**—After initially installing the Mobility Client, you do not need to reprovision unless the server connection details change, or the device is removed from the server configuration.

- **Check for updates**—When your mobile device is connected to an enterprise access point, you can check for Mobility Client software updates on the Mobility Router.

- **About**—Get version information about Mobility Client.

- **Help**—Access help about 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.
	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.

Icon	Name	Description
	Hold	A call is on hold.
	Incoming Call	A call is coming in.

Exiting The Mobility Client

1. Press the **BlackBerry button**.

2. Select **Clos**e (or select the Back key to exit the application).

Note

ShoreTel Mobility runs in the background and never fully shuts down until you uninstall it.

CHAPTER
3

Managing Calls

Using the ShoreTel Mobility Client application dialer feels the same as using your device's dialer. Your mobile device's screen becomes active when you place or receive a call, and the in-call options appear. 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

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 green **Call** key.

■ Ignore—Press the red **End** key.

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 green 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 24.

To decline a call while on another call:

■ Press the red **End** key.

If you are on a Wi-Fi call and receive a cellular call, the cellular call is routed to your cellular voice mail.

To reject incoming calls before your device rings, press the **BlackBerry Button** > **Do Not Disturb**. Press the **BlackBerry Button** > **Clear Do Not Disturb** to revert to allowing incoming calls to ring the device.

50Accepting Calls when Your BlackBerry is Locked

To accept calls on a locked BlackBerry device, the password for the device must be the same as the password for the application. If the passwords differ, the application remains locked while you answer incoming calls using the native BlackBerry calling feature. If you do not set a BlackBerry password, the ShoreTel Mobility application password must also be empty.

Set the native BlackBerry client password for the ShoreTel Mobility application using the following steps:

1. From the ShoreTel Mobility application main screen press the **BlackBerry Button** > **Preferences** > **General.**

2. Scroll to **System Password**.

3. Enter the same password that you use for the BlackBerry native client.

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 Network Preferences on page 58 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 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. With the application main screen active, enter the phone number you want to call.

2. Press the green **Call** key to see the in-call options.

Placing an Active Call on Hold

To place an active call on hold:

1. Select **Hold**.

2. To make the call active again, select **Un-hold**.

Placing a Call While on an Active Call

To make another call while on an active call:

1. Select **Hold** to put the first call on hold.

2. Choose from the following actions:

   - Use the keypad to enter the new number and select **Call**.

   - Select the **Back** button to return to the native dialer Home screen to access the **Contacts** list.

■ Select the **BlackBerry Button** > **Directory Search** from the buddy list to access the company directory, then call the buddy. For more information about Presence and Buddies, refer to Calling a Buddy on page 47.

> **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.

For information regarding making a call using the Presence feature, refer to Calling a Buddy While On Another Call on page 47

Placing Calls when Your BlackBerry Is Password Locked

Your ShoreTel Mobility Client must use the same password as your native BlackBerry client. To place calls on a locked BlackBerry device, you must select the option to allow outgoing calls. If the passwords differ, the application remains locked. If you do not set a BlackBerry password, the ShoreTel Mobility application password must also be empty.

> **Note**
>
> If you try to place a call when the device is locked, you see the message **Device is locked**. Scroll to and select **Place Call** to continue. The native client opens briefly before the Mobility client opens.

To enter the native BlackBerry client password for the Mobility client:

1. From the BlackBerry Home screen, press the **BlackBerry Button**, and then scroll to and open **Settings** > **Options**.

2. Scroll to and select **Password**.

3. Scroll to **Allow Outgoing Calls While Locked** and select **Yes**.

4. Press the **BlackBerry Button** > **Save**.

5. Press the **BlackBerry Button** > **Close**.

6. Press the **BlackBerry Button** > **ShoreTel** to open the ShoreTel Mobility Client.

7. Press the **BlackBerry Button** > **Preferences** > **General.**

8. Scroll to **System Password** and enter the same password that you entered for the BlackBerry native client.

9. Press the **BlackBerry Button** > **Save**.

Ending an Active Call

■ Press the red **End** key to end an active call. If you have one active call and another on hold, select the **BlackBerry Button > End All Calls** to end both calls.

Managing Ringers

By default, when your device is connected to a cellular network, you hear the standard BlackBerry ringer when a call comes in. When your device is connected to a Wi-Fi network, you can use both the normal ringer and vibrate mode. Consult your BlackBerry Smartphone documentation for instructions about how to change your ringer settings.

Using Personal Dial (Dual Persona™) Mode

You can use the Mobility Client application to switch from using your mobile device for business use to personal use.

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 mode is enabled by default. To switch to Personal Dial mode, select the **BlackBerry Button** > **Set Personal Dial**. The personal mode icon appears.

For information about accepting calls when the mobile device is locked, see Accepting Calls when Your BlackBerry is Locked on page 26.

To disable Personal Dial and return to Business Dial mode select the **BlackBerry Button** > **Set Business Dial**.

Specifying Contacts as Personal Contacts

If there are people that you call often using Personal Dial, you can add these contacts to a group named ShoreTel Personal. You can access the ShoreTel Personal group from your Contacts. When you call anyone in the ShoreTel Personal group, the call is always uses Personal Dial.

> **Note**
> You must have at least one contact before you can set up Personal Contacts that use Personal Dial.

Complete the following steps to create a personal group:

1. From the native Home screen, select **Contacts** > **BlackBerry Button**.

2. Scroll to **New Group**.

3. Enter `ShoreTel Personal.`

4. Scroll to and select **No Contacts**.

5. Select **Add Member**.

6. Select a member.

7. Press the **Select** button again and select **Save Group**.

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

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

Using Contacts to Place Calls

1. From the BlackBerry Home screen, select **Contacts**.

2. Select the name of the contact you want to call.

3. Press the green **Call** button.

Using Call Log to Place Calls

From the application main screen, press the green **Call** button to view the call log. Select a contact and press the green **Call** button again.

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 turn on the loudspeaker, select the **Speaker** option.

- To turn off the loudspeaker and continue the call using a handset, select **Handset** 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.

- To mute a call, select **Mute**.
- To unmute a call, select **Un-Mute**.

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**. The active call is put on hold, and the other call becomes 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. You can set the enterprise extension in the Call Settings screen. 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 in the Call Settings screen. For more information, see Changing Network Preferences on page 58.

1. While on a call, select the **Transfer icon**.

2. In the popup that appears, select **To Contact** or **To Other Device**.

   ■ **To Other Device—**automatically transfers the 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 your desk phone. Contact your ShoreTel Mobility administrator for details about your IP PBX configuration.

   ■ **To Contact**—When transferring a call to a contact, use the keypad to enter the contact's number or select **Contacts**, and then select then the name of the contact from the list. Press the green BlackBerry Call button to transfer to the call.

   Note

   You can transfer calls using your Buddy list, Contacts, Call Log, or Directory Search. Select the green BlackBerry Call button to complete the **Transfer** function using any of these options.

3. To end the transfer, select **End Transfer**.

4. To end the original call, select **End Call**.

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. Place a second call by using the keypad, the call log, or by selecting a Buddy or Contact. The first call is put on hold.

Note

You can add a buddy or contact to a conference depending on the ShoreTel Mobility Router configuration. Check with your ShoreTel Mobility administrator for local contact and Active Directory configuration details.

3. Use the trackball/trackpad to select **Join Conference**.

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.

Depending on your IP PBX configuration, when the originator of the conference call hangs up, the other participants are no longer connected.

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 Network Preferences on page 58 for more information.

To change the network while on an active call:

1. Select the **BlackBerry Button** > **Network Selection**.

2. Choose from the following options:

    ■   **Cell**—Use only the cellular network.

    ■   **Wi-Fi**—Use only the specified wireless network (WLAN)

Note

If a Wi-Fi network is not automatically selected in this **Network** tab, select the **BlackBerry Button > Manage Wi-Fi Connections** and select the Wi-Fi connection you want to use.

    ■   **Cellular Data**—Use only VoIP over cellular data to place and receive calls. Refer to Changing Network Preferences on page 58 for information about selecting the cellular data network.When selected, a warning message displays alerting you that VoIP call quality may vary depending on the carrier's cellular data network.

Note

After you select the Cellular Data option, manually turn the Mobile Network off and then on again from the BlackBerry home screen.

3. Select the **BlackBerry Button** > **Save**.

Disconnecting from the Enterprise Wi-Fi Network

You can disconnect your mobile device from the enterprise Wi-Fi network so that you use only the cellular network for calls. From within the application, select the **BlackBerry Button** > **Disconnect Wi-Fi**.

Connecting to the Enterprise Wi-Fi Network

If a Wi-Fi network is available, you can connect the device to the Wi-Fi network so that the device uses the Wi-Fi network to place and receive calls when possible. From within the application, select the **BlackBerry Button** > **Connect to Wi-Fi** to use the Wi-Fi.

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. Press the **BlackBerry Button**.

2. Select **Voice Mail**, then choose **Cellular Voice Mail** to dial your voice mail.

You are now connected to your cellular voice mailbox. Check your voice mail as you normally would.

Accessing Enterprise Voice Mail

To access enterprise voice mail:

1. Press the **BlackBerry Button**.

2. Select **Voice Mail** > **Visual Voice Mail** > **BlackBerry button** > **Enterprise Voicemail** to dial your voice mail.

You are now connected to your enterprise voice mail system. Access your mailbox as you normally would.

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

The following icons show Presence status:

Table 2: Status Icons

Status Icon	Description
	Available
	Away
	Busy
	Do Not Disturb (DND)
	Inactive
	In a Meeting
	In a Conference
	Offline
	Be Right Back (BRB)
	Out of the Office
	In a Call

The following table describes location icons:

Table 3:

Status Icon	Description
	Home
	On the Road

Table 3:

Status Icon	Description
	Office
	Custom Location

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:

1. Select the **BlackBerry Button** to view the **Menu** items.

2. Select the ShoreTel Mobility Client application.

3. Select the **BlackBerry Button** > **Preferences** > **Advanced** > **Presence** > **On**.

4. Press **Back** and select **Save**.

Setting Presence Status

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

1. From the ShoreTel application main screen, select your buddy name at the top of the Presence screen.

2. In the pop-up menu that appears, select **Set Presence**.

3. Choose a status from the list. Note that depending on the status you choose, the color indicator next to your buddy name changes. Refer to Table 2 on page 38 for detailed information.

4. You can override the default status by selecting any of the settings in Table 2 on page 38. Select **Reset** to return to the default 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. In the main ShoreTel Mobility application screen, select your name at the top of the **Presence** screen and press the trackpad/scroll button. A pop-up menu opens.

2. Choose a location from the list. Note that depending on the location you choose, the indicator next to your name changes. Refer to Table 2 on page 38 for detailed information.

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

Adding and Deleting Buddies

You can add or delete buddies.

Adding Buddies

To add a buddy:

1. Select the **BlackBerry Button** > **Presence Options** > **Add Buddy**.

2. In the **Enter Buddy URI** field, type in the name (URI) of a buddy as it is entered on the enterprise server.

3. Select **OK** to continue and add the new buddy, or select **Cancel** to return to the presence window without saving changes.

> **Note**
>
> Adding a buddy presents a notification prompt on the device of the buddy being added. In the notification window, select the Access Type of this user, then select **Add to Buddy List**. Refer to Setting a Buddy's Access Level on page 41 for information on Access levels.

Deleting Buddies

To delete one buddy:

1. Select a buddy.

2. Press the trackpad button.

3. Select **Delete Buddy**. The buddy is deleted.

To delete all buddies:

1. Select the **BlackBerry Button** > **Presence Options**.

2. Select **Delete All** to clear your buddy list.

Setting a Buddy's Access Level

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

Table 4: 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 **the application**, select a buddy.

2. Press the trackpad button on the keypad.

3. Select **Access Level**.

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

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. From the application, select a buddy.

2. Press the trackpad button on the keypad.

3. Select **View Details**.

   Information relevant to this buddy appears, including status, location, access level, and contact information. This information is read-only by anyone other than this buddy.

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

5. Select **OK** to return to the main presence window.

Sorting the Buddy List

Use the following steps to sort your buddies:

1. Press the **BlackBerry Button** > **Presence Options** > **Sort Buddy List.**

2. Choose how to sort the list: **By Name, By Availability**, or **By Location**.

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. Launch the application.

2. Select the **BlackBerry Button** > **Presence Options** > **IM History**.

3. Select how long to keep IMs.

4. Select **OK**.

Enabling/Disabling IM Notifications

To enable/disable receiving notifications for new IMs:

1. Depending on your version of BlackBerry, from the BlackBerry main screen, select the **BlackBerry Button** > **Settings** > **Options** > **Sounds and Ring Tones** > **Sounds for Selected Profile**.

2. Scroll down to **Other Applications - Notifiers** and expand the menu.

3. Select **ShoreTel**.

4. Set the **Sound Alerts**, **Visual Alerts**, and **Tactile Alerts** you want to use for ShoreTel notifications. For information about how these options work, refer to the documentation for your BlackBerry device.

Starting a Conversation

To start an IM conversation:

1. Select a buddy.

2. Select **Send IM**.

3. Type a message to the buddy and select **Send**.

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:

1. Select **Close** to dismiss the IM, or **View** to display the message.

2. Enter text and select **Send**.

Open and Close Instant Message Conversations

You can open previous conversations to continue them.

- From the ShoreTel Mobility application, select the **BlackBerry Button** > **IM Conversations** > **Active** or **History**.

  - Select a conversation to open it.

  - When an IM conversation is open, select the Escape key to return to the list of buddies and close the conversation.

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 **BlackBerry Button** > **Participants**.

2. Type the name of the buddy you want to add to the conversation and then select **Done**.

3. Select the participant name that shows a green plus sign, and then select **BlackBerry Button** > **"+" (add)**.

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 conversion, you are the Moderator, which means only you can remove participants from a conversation.

■ In an IM with at least two participants, select **BlackBerry Button** > **Participants**, select the participant you want to remove from the conversation, and select the **BlackBerry Button** > **X (remove)**.

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 BlackBerry Back key twice to return to the buddy list.

2. Select the buddy you want to call.

3. Press the trackball to open the context menu.

4. Select **Call**.

5. Select **Home**, **Enterprise/Work**, or **Cell** and select the BlackBerry trackball button to place the call.

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:

■ While in a call, select the **BlackBerry button** > **Buddy List**. Choose a buddy or select conversations, following the standard Instant Message procedure to send an IM.

To respond to an IM while on a call:

1. While in a call, the BlackBerry vibrates when you receive an IM. Press the **BlackBerry Button** > **Buddy List**. Press the center button to select. A popup displays indicating the sender's name.

> **Note**
>
> To see if this feature is enabled on your mobile device, check your BlackBerry settings. Refer to your BlackBerry documentation for this feature.

2. Press the **BlackBerry Button** > **IM Conversations**. The active IM opens. Highlight and press the center button to select the message.

3. Select **Open**.

Active IM Sessions

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

1. Select **BlackBerry Button** > **IM Conversations**.

2. Select **Active**, select a conversation, and use the BlackBerry trackball button to choose from the following options:

   - **Open**—Reopen the conversation.

   - **Close**—Close the conversation and remove it from the Active area.

Non-active IM Sessions

To view previous IM conversations:

1. Select **BlackBerry Button** > **IM Conversations**.

2. Select **History**, select a conversation, and press the BlackBerry trackball button to choose from the following options:

   - **Open**—Reopen the conversation.

   - **Delete**—Permanently delete the conversation.

Logging In/Out

Log off of the Presence server, as follows:

1. Select the **BlackBerry Button** > **Presence Options**.

2. Select **Logout**.

Log on to the Presence server, as follows:

1. Select the **BlackBerry Button** > **Presence Options.**

2. Select **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 trackpad button on the keypad.

3. Select **Email**.

4. From the native email applications associated with the Office Communicator Server, select an application to use to send the message and follow the native application instructions for sending the email.

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

Calling a Buddy

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

1. Select a buddy.

2. Press the trackpad button on the keypad.

3. Select **Call** and choose the number to call depending on which numbers are configured on the server (mobile number, enterprise number, or home number).

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. Select the **BlackBerry Button** > **Buddy List**.

2. Select a buddy.

3. Press the trackpad button on the keypad.

4. Select **Call.**

5. If the buddy's mobile number, enterprise number, or home number is configured on the server, you can select an option to call that number.

   The first buddy is automatically placed on hold.

Searching for a Buddy

Use the following steps to search for a buddy:

1. Select the **BlackBerry Button** > **Presence Options**.

2. Select **Search Buddy**.

3. Enter the first few letters of the buddy's name and select **Search**.

4. Select **Add Buddy**. The buddy is now added to the buddy list.

Changing the ID and Password

The ShoreTel Mobility application does not require you to use the same user ID as your Presence infrastructure (e.g. Microsoft OCS 2007 R2). For example, if you want to loan your phone to a buddy, that person can log in with their Presence ID.

To change the Presence ID on your mobile device:

1. Select the **BlackBerry Button** > **Presence Options**.

2. Select **Change ID/Password**.

3. Enter the new **Presence ID** and **Password** and select **OK**.

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.

When you use your BlackBerry outside of Wi-Fi coverage, BlackBerry Enterprise Server (BES) service may be used to perform the tasks listed below. These tasks, in this scenario, do not require ShoreTel Secure Enterprise Services to be enabled:

- Upload Logs
- Check for Updates
- Provision/Re-provision
- Directory Query functions

This chapter contains the following sections:

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 Network Preferences on page 58 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.

Secure Remote Voice

If your Mobility account is set to Block Remote VoIP Calls if Cell Coverage Is Not Available, and your device is connected to Wi-Fi with Secure Remote Voice when you attempt to place a call in an area that has no cellular coverage, the message shown in the image below displays. Your system administrator sets the **Block Remote VoIP Calls if Cell Coverage Is Not Available** option in **Configuration** > **Users and Groups** > **Groups** > **Options** on the Mobility Router.

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:

 Secure Enterprise Services

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

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

Note

Connect the device to the BlackBerry Internet Service (BIS) or the BlackBerry Enterprise Server (BES) as an alternative. Use the BES to control all permission settings locally on the device. Contact your system administrator to determine if your device is BES-connected.

- 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 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 the **BlackBerry Button** > **Directory Search**.

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

   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. Select the **BlackBerry Button** > **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 the **BlackBerry Button** > **Call** or press the green **Call** key.

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 the **BlackBerry Button** > **Add to Contacts**.

3. Modify information as appropriate, then press the **BlackBerry Button** > **Save**.

CHAPTER

7

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.
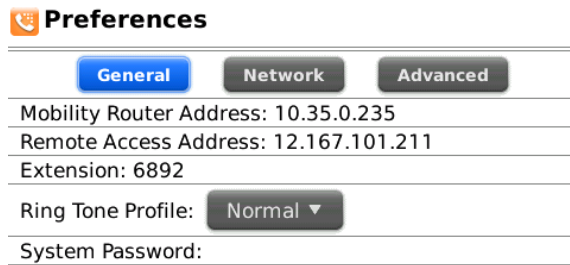
This chapter contains the following sections:

Viewing General Preferences

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

1. Select the **BlackBerry button** > **PreferencesGeneral**.

2. Verify the **Mobility Router Address**, **Remote Access Address**, and **Extension** number. These are read-only fields.

3. Set the **Ring Tone Profile** as appropriate.

4. Select the **BlackBerry button** > **Save**.

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.

To modify your network preferences:

1. Select the **BlackBerry button** > **Preferences**. Scroll to and select the **Network** tab.Select the displayed option. **In the Allowed Data Networks** area**,** the following options are available:

   - **Wi-Fi**—When enabled, Wi-Fi networks are use to connect to the ShoreTel Mobility Server whenever possible. When disabled, the ShoreTel Mobility application does not use Wi-Fi networks.

   - **Cellular Data**—When enabled, a cellular data connection may be used to connect to the ShoreTel Mobility Server. This option may be disabled if the your account has not been 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. This option is only available if your account has been enabled for cellular data roaming on the ShoreTel Mobility Router.

2. In the **Call Routing Preferences** area, choose from the following options:

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

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

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

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

   - **Cellular Data Roaming**—When enabled, voice calls can be placed using a cellular data connection also 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**—When enabled, enterprise calls may be placed as cellular voice calls also 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.

3. Select **Preferred Wi-Fi Connection** to change the connection for the application, as follows:

   a. Select the **BlackBerry button** > **Preferences** > **Network** > **BlackBerry button** > **Preferred Wi-Fi Connections**.

   b. Press the scroll key to select or clear the check box for the access point. If the check box is selected, pressing the scroll key clears the check box. If the check box is not selected, pressing the scroll key selects the check box.

   c. Repeat these steps for each access point you want to change.

4. Scroll to **Preferred Data Connection** and set the data connection as follows:

   a. Select the displayed option to view a dropdown list of access points to select from.

   b. Select or clear the access points that you want to use as preferred data connections.

   c. Press the **BlackBerry button** > **Save**.

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.

- Specify the type and level of entries to save in the log, and enable/disable logging.

To change advanced settings:

1. To set the power save mode:

- **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.

- Select the **BlackBerry button** > **Preferences**.

2. Use the select key to navigate to the **Advanced** tab.

3. Navigate to **Enterprise Voice Mail**.

4. Use the **del** button to erase the currently displayed number. Enter the phone number or extension used to access enterprise voicemail. If there is no number displayed, enter the phone number or extension.

5. Select **OK**.

6. Navigate to **Cellular Voice Mail Number**.

7. Use the **del** button to erase the currently displayed number. Enter the phone number or extension used to access cellular voicemail. If there is no number displayed, enter the phone number.

   The cellular voicemail number is the phone number that the application calls to access cellular voicemail for the mobile device. The phone number for the mobile device is usually used to access voicemail.

8. Navigate to **ShoreTel**.

9. Select **Enable** or **Disable**.

Note

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.

10. Navigate to **Power Save Mode**, and select one of the following options:

   ■ **Always On**—The mobile device always searches for one of the specified preferred access points and maintains a connection when it is within range of the enterprise Wi-Fi network. Selecting this option might reduce the device's battery life.

   ■ **Enterprise Only**—If the mobile device is in range of the enterprise, a Wi-Fi connection is maintained. If the mobile device is not in range of the enterprise, no attempts are made to connect to a preferred access point.

   ■ **Calls Only**—If the mobile device is within range of the preferred access point, a connection to the access point is made only when calls are placed or received.

11. Set the following options:

   ■ Select **Presence On/Off** to enable/disable Presence on this device.

   ■ Select **Log Enable On/Off** to enable/disable capturing log events on this device.

   ■ Select **Log Level** to choose the appropriate level of log events to capture.

   ■ Select **Font Size** to change the appearance of the UI.

   ■ Select **Primary Device** to change the setting to **Yes** and to make this device primary. **Refer to** Provisioning the Device on page 15 for more information about Primary Devices.

   ■ Select **ShoreTel Communicator Features** to enable/disable this feature set.

   ■ Select the Communicator **User Name**. This is the user name assigned to your enterprise extension. The User Name field can be left blank; the application attempt to automatically determine the credentials, and prompts you if that fails. Refer to Changing ShoreTel Communicator Settings on page 63 for details.

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

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

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

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

12. Press the **BlackBerry button** > **Save**.

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 Other Device**—Transfer the call to your desk phone, or another mobile device associated with your ShoreTel Mobility account. 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 the **BlackBerry button** > **Call Settings**. The **Call Settings** screen appears.

2. Choose from the following options:

   - **Call Forward**—Forwards incoming calls to a specified phone number, as follows:

     - **None**—No incoming calls are forwarded, and all calls are sent to the mobile device.

     - **Forward to Voice Mail**—All incoming calls are immediately forwarded to voicemail. Incoming calls to your enterprise phone number do not ring on your desk phone or mobile device.

     - **Other**—Specifies that all calls are forwarded to a specific phone number. After you select this option, enter the phone number to which calls are forwarded, and select **OK**. If you select the **Other** option and select **Cancel** without entering a phone number, the setting reverts 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.

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

■ **Transfer To Desk**—By default, the extension of your enterprise phone number is used when transferring an active call from your mobile device to your desk phone.

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

To change the phone number used to transfer calls to your desk phone, scroll to **Transfer To Desk**. Enter the phone number or extension that is used when transferring active calls to your desk phone.

3. Select the **BlackBerry button** > **Save** to save your settings, or select **Back** to return to the application main screen.

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 the **BlackBerry** button to view the **Menu** items.

2. Select **ShoreTel**.

3. Enter the Communicator User Name and Password. This is the user name assigned to your Enterprise extension in Communicator for Mobile.
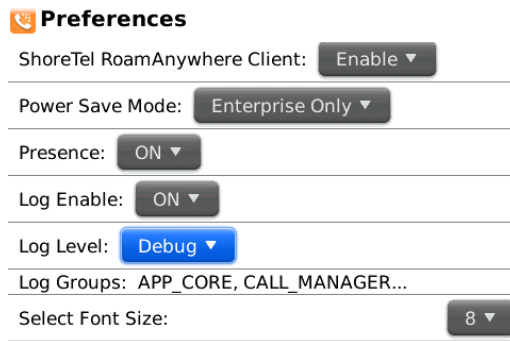
Uploading Logs to the ShoreTel Mobility Router

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.

Enabling Logging

Logging must be enabled before you can upload logs to the Mobility Router.

1. From the ShoreTel Mobility Client, select the **BlackBerry button** > **Preferences** > **Advanced**.

2. Scroll to and select **Enable**.

3. Select **Back** and **Save** your changes as prompted. 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. From the ShoreTel Mobility Client, select the **BlackBerry button** > **Preferences** > **Advanced**.

2. Press the **BlackBerry button** > **Upload Logs**.
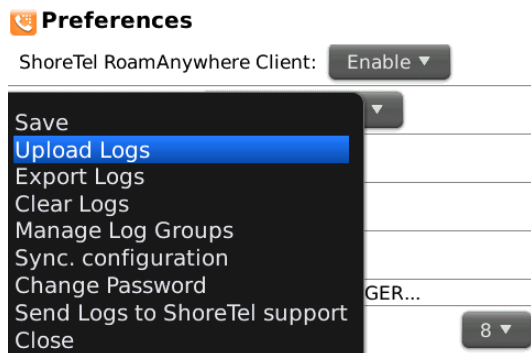
3. Optionally, enter a brief description of the nature of the error.

4. Click **OK** to send the log.

5. Select **Close** to return to the main **Client** menu.

> **Note**
>
> If you are not able to upload a log, use the Send Logs to ShoreTel support function to send the logs via email.

APN Setting on BlackBerry

Access Point Name (APN) is a computer protocol that allows your computer to access the internet using the mobile phone network along with the configurable network identifier for the device when you connect to a GSM carrier. The carrier uses this identifier to determine network connection details such as what IP addresses should be assigned to your mobile device, what security methods should be used, and/or how the device connects to a private customer network.

Set the APN to provision and register the ShoreTel Mobility Client with the Mobility Router. Neglecting to set the APN or setting the APN with incorrect parameters may cause the BlackBerry provisioning and/or registration to fail.

Complete the following steps to set the APN:

1. From the main BlackBerry screen, select the **BlackBerry button** > **Settings** > **Options** > **Advanced Options** > **TCP/IP**.

> **Note**
>
> If you are using BlackBerry OS 7+ select **All** > **Options > Device** > **Advanced System Settings** > **TCP/IP**.
>
> ```
> TCP/IP
> ☑APN Settings Enabled
> APN: wap.cingular
> ☑APN Authentication Enabled
> Username for APN: WAP@CINGULARGPRS.COM
> Password for APN: *********
> ```

2. Select **APN Settings Enabled**.

3. In the **APN:** field, set the correct APN value. This value varies among carriers. You can find this information online or get it from your cellular service provider.

   For example:

   ```
   http://www.blackberryfaq.com/index.php/
   Carrier_specific_APN/TCP_settings
   ```

4. Select **APN Authentication Enabled**.

5. Enter the correct username in the **Username for APN:** field. You can find the user name online or get it from your service provider.

6. Enter the correct password in the **Password for APN:** field. You can find the password online or get it from your service provider.

APPENDIX
A

Dialing from a Meeting Invitation, Calendar Appointment, or Email

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.

For dialing an automated attendant, the client also supports the following syntax:

Table 6: URL-Based Dialing

Device	wait/prompt	2 second pause
BlackBerry	";"	";"

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 main ShoreTel Mobility screen, press the **BlackBerry Button** > **Preferences** > **Advanced**. Scroll to **Calendar Conference** and set it to **ON**.

2. Select the slider to set 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.

Dialing From an Email Message

You can also dial calls from selecting links in email message. The following table shows supported formats and example uses for this feature:

**Table 7: Supported Email Message Formats**

Format	Supported
Plain Text Email	✓
HTML Email	✓ (BlackBerry OS 6.0+)
Hypertext link in an Email Message	-
Microsoft® Outlook Calendar Invitation	✓

Table 8: Examples

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

In the following sample email invitation, you would dial the URL as follows (depending on your device):

1. Select the link to view a popup menu.

2. Select which dialer to use to dial the VoIP URL.
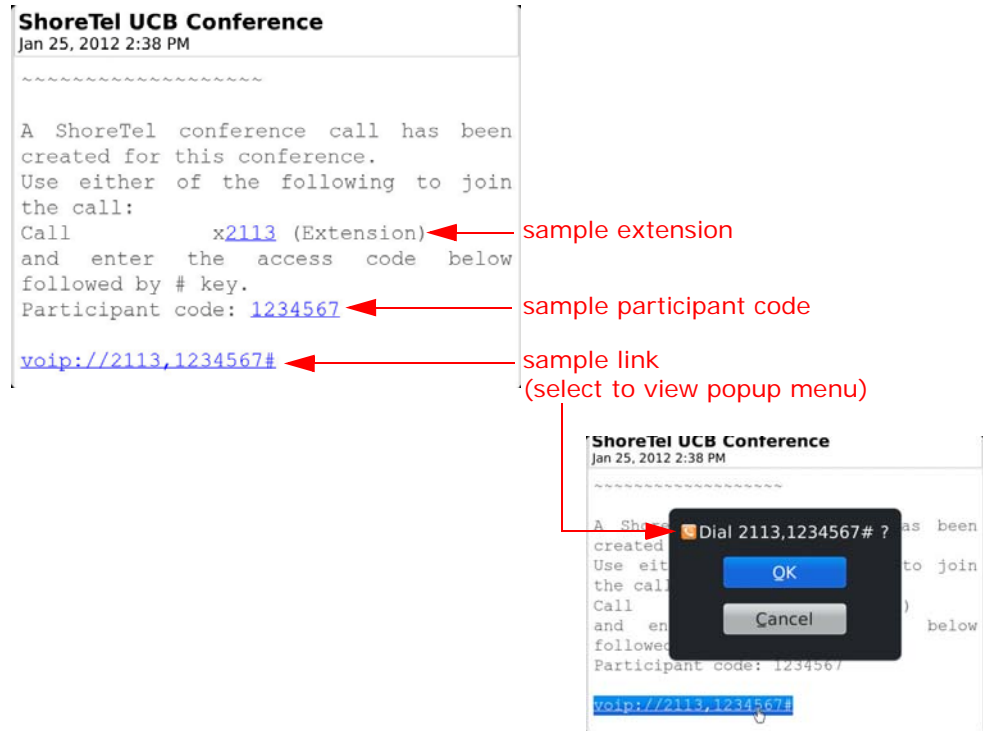
3. Select **OK** to continue, or select **Cancel** to return to the previous menu.

In the following example calendar invitation, you would join the meeting as follows (depending on your device):

1. Select the link to view a popup menu.

2. Select the dialer to use to dial the VoIP URL.
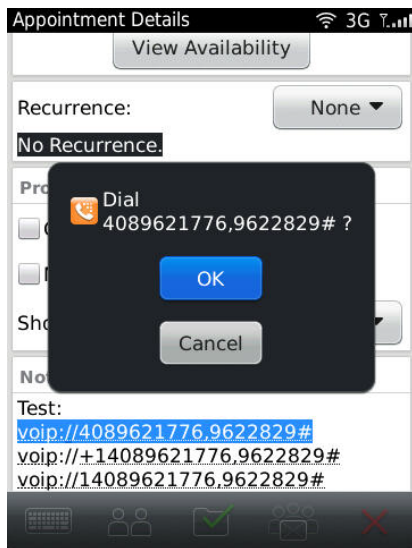
3. Select **OK** to continue, or **Cancel** to return to the previous menu.

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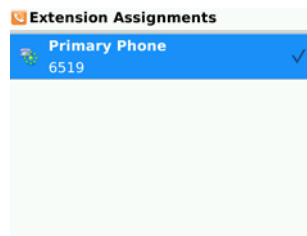
2. Select **Primary Phone** to have incoming calls routed to your primary phone (in most cases, a desk phone). Select another EA in the list to have incoming calls routed to that phone number. In this case, the primary phone becomes "Anonymous".

    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.

> ✏️ **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. Select the **BlackBerry button** > **ShoreTel** > **Voice Mail**.

2. Select a voice mail message from the list, select the **BlackBerry button** > **Play**.

3. Select **Enterprise Voicemail** to dial the enterprise voice mail service.

   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. Select the **BlackBerry button** > **Call Back**.

Deleting Messages

To delete a voice mail message:

1. Select a voice mail message from the list.

2. Select the **BlackBerry button** > **Delete**.

3.

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:

1. Select the **BlackBerry button** > **ShoreTel** > **Call Handling Mode**.

2. 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.