

Phone Manager Mobile User Guide

APRIL 2018

DOCUMENT RELEASE 5.1

USER GUIDE



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Mitel Phone Manager
Release 5.1 - April, 2018

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1 What's New

Version 4.3

The initial release of software.

2 Introduction

2.1 Overview

Phone Manager Mobile provides you with access to the office telephone system while on the move. This document is designed for end-users to help them understand the product, how to install it and how to use it:

[Quick Start](#)

[Requirements](#)

[Features](#)

[Settings](#)

[Connectivity Problems](#)

2.2 Requirements

Phone Manager Mobile is available for both iOS and Android platforms. The following section outlines the supported operating systems Phone Manager Mobile has been designed to support and the hardware variants it has been tested against.



Phone Manager may run on devices not listed here as long as the operating system version is supported. However, not all features can be guaranteed to work on devices not in the list.

For unlisted devices support will be offered on a best endeavors basis.

The client is not optimized for use on tablets.

For use while traveling in the car we recommend using 'OfficeLink' as opposed to the softphone as this will generally give a call connection with a variety of mobile signals where a softphone data connection may not be reliably maintained.

Bluetooth devices are not officially supported with this release, the level of functionality is solely based on the support of Bluetooth devices provided by the OS.

Please refer to the release notes for up to date information.

iOS

Supported Operating systems

- iOS 11.x
- iOS 10.x
- iOS 9.x

Supported Hardware

- iPhone 7 / 7 Plus
- iPhone 6 / 6s / 6 Plus / 6s Plus
- iPhone 5 / 5s / 5c
- iPhone SE

Android

Supported Operating systems

- Oreo (8.x)
- Nougat (7.x)
- MarshMallow (6.x)
- Lollipop (5.x)

Supported Hardware

- HTC One M8
- Motorola Droid Turbo / G3 / G5 Plus
- Nexus 5X
- Samsung Galaxy S5 / Galaxy S5 mini / Galaxy S6 / Galaxy S6 Edge / Galaxy S7
- Sony Xperia Z3 / Xperia Z3C

Network Performance for Softphone Calls

- Bandwidth (per call) - 32 kbit/s
- Latency - not exceeding 150 ms
- Jitter - not exceeding 50 ms

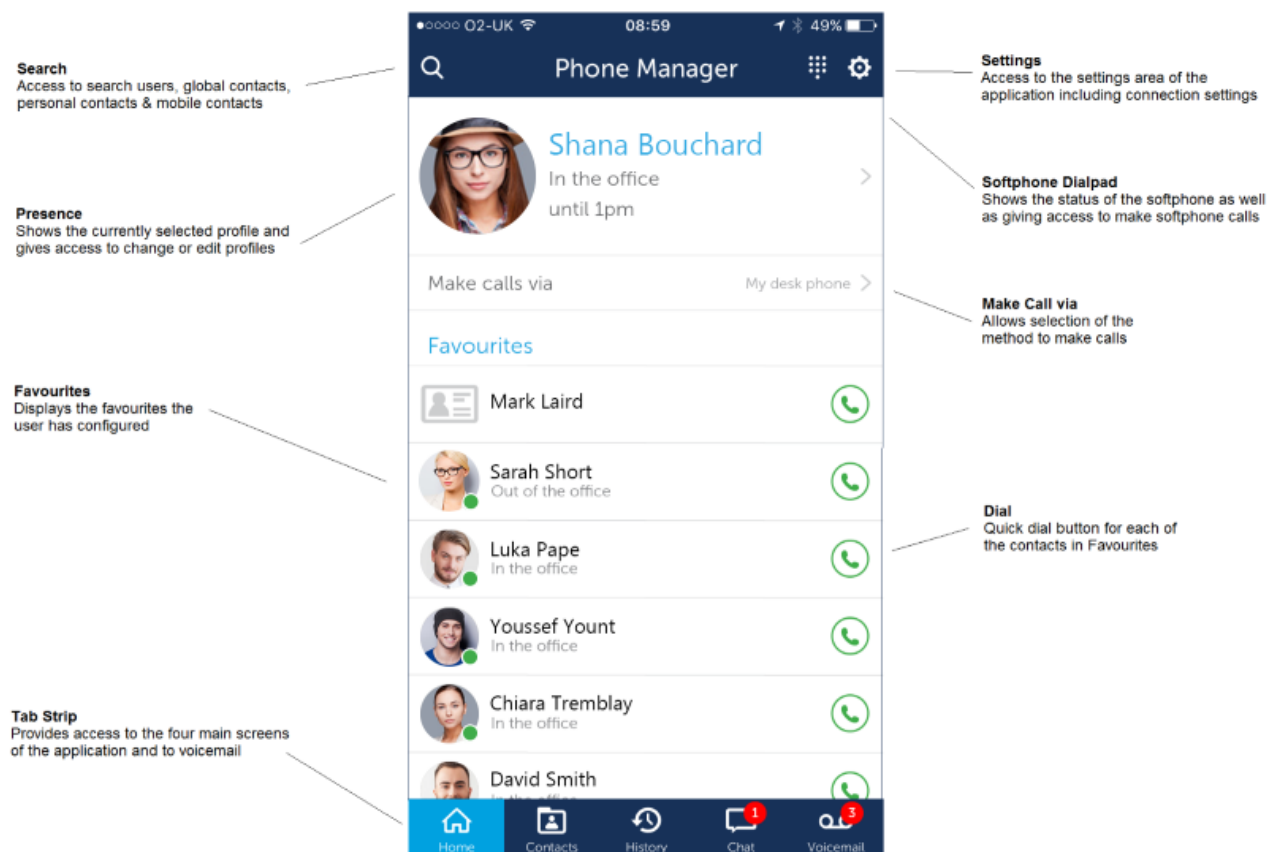
Network Data Utilization for Softphone Calls

- A call would use a maximum of 32kbit/s which calculates into 4 Kbyte/s or 240 Kbytes per minute

2.3 Quick Start

The guide provides information for frequently used features. For more information about these and other features, refer to the user guide.

Phone Manager Mobile UI





Making Calls

Users, Contacts and history items can all be dialled from Phone Manager Mobile. When making calls, any one of the following methods can be used:

- Calls can be made from your primary device
- Calls can be made on the mobile phone
- Calls can be made using the built-in softphone
- Calls can be made using OfficeLink

The method to make calls is displayed under the Presence section.

 Calls can only be made using the softphone if it is licensed and enabled

 When using OfficeLink, the phone system will ring you, once you answer it will put you through to the number you dialled

Tab Strip

The tab strip provides access to the four main screens of the application as well as displaying the current number of voicemails a user has, and providing a shortcut to dialing voicemail.


- **Home** -> The main screen allowing the user to control their presence and see their favorite contacts.
- **Contacts** -> Access to see Personal, Global and Mobile Contacts
- **History** -> Call history for all assigned extensions
- **Chat** -> Chat with other users of Phone Manager Mobile/Desktop

The currently displayed screen will show on the tab strip with a light blue color.

To access voicemail, press the voicemail icon on the tab strip and follow the instructions.

Contacts

The contacts tab within Phone Manager provides a snap-shot view of information about other contacts including users, personal contacts, global contacts and mobile contacts. This screen provides methods to make calls, initiate chat sessions and send emails (if email address configured for this contact).

 Sending an email will open the native email client on the mobile device

History

The Call History window shows all internal, external and missed calls on all of your assigned devices.

When the Call History window is not open, any missed calls will be notified with a red circle on the tab. Calls can be returned by pressing the handset icon.

A history of any calls made to or by any of the devices associated with your user account will be displayed.

Chat

Chat with other Phone Manager users, these can be other Mobile users or Desktop users. New conversations can be started by pressing on the + button on the chat screen or from the Favorites or Contacts screen. Swipe left on an existing conversation to hide it from view.

3 Features

3.1 Home

Home

The Home screen provides access to the most commonly used features of Phone Manager. Each section of the Home screen is outlined below. To refresh any details on the screen swipe down at any time.

Presence Profiles

Presence profiles are an important part of controlling how other users and customers can get hold of you and letting them know what you are currently doing.

From the Home screen Presence Profiles can be selected and/or edited. As long as the application can connect to the MCS server, changing the profile will have an immediate effect on how calls are routed and how other users see your status.

For more information about how [Presence Profiles](#) work, please follow this link.

Making Calls

Phone Manager Mobile provides a variety of ways to make calls. You can quickly change between methods from the Home screen or configure the system to prompt each time a call is made.




- This Device -> Calls are made using the mobile phone itself. When making calls this way the Mobile's phone application will be loaded and will take focus away from Phone Manager
- My desk phone -> Calls are made on the primary device. Once a call is made Phone Manager Mobile has no control over it.
- Softphone -> Calls are made from the embedded softphone. For this option to display the softphone must be licensed and enabled.
- (Ask me every time) -> When making a call a dialog will request which method should be used.
- OfficeLink* -> This method of making calls is available for each of the external numbers configured against your user account on the telephone system. When making calls this way the telephone system will ring the mobile device and will then patch through the dialed number when the mobile answers

* When using OfficeLink the DID of the primary DEE device will be presented. If answer supervision is enabled on the telephone system, you may have to press '#' after answering the incoming call.

Favorites

Each user has control of which items appear in their Favorites view. The favorites view on Phone Manager Mobile is the same as on Phone Manager Desktop and changes to one will be visible in the other.

Selecting the blue star icon from within a contact adds/removes the contact from the favorites view.

-  All contacts added to the favorites view will be visible on the desktop version of Phone Manager except for Mobile based contacts.
-  Extension, Agent & Hunt Group items that have been added to Favorites on Phone Manager Desktop will not be visible on Phone Manager Mobile, just Users, Personal & Global Contacts.
-  Unlike the desktop client, the free busy information is based on the users free busy status across all of their PBX DEE devices.

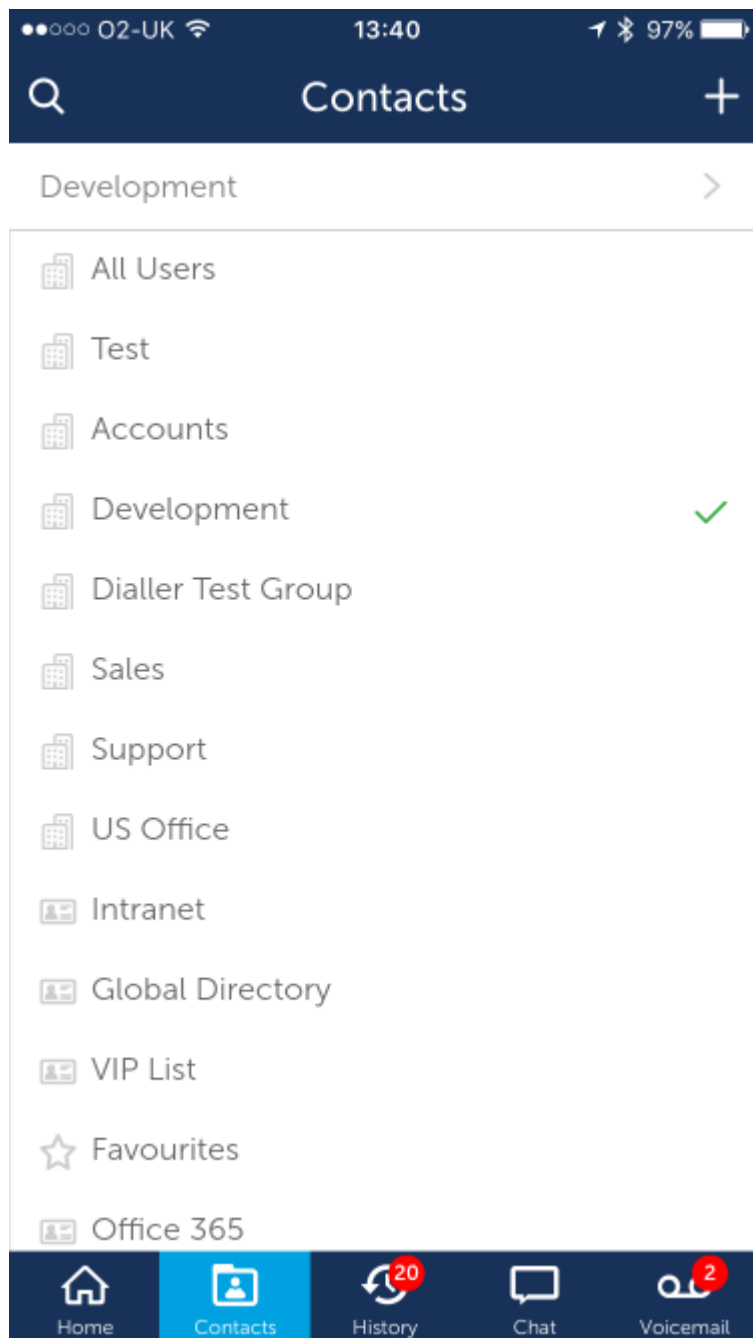
3.2 Contacts

The Contacts screen gives you access to the following types of contacts:





- Users -> Other users of Phone Manager
- Global Contacts -> Server based contact directories
- Personal Contacts -> Personal Phone Manager contacts that have been created on the mobile or desktop client
- Mobile Contacts -> Contacts that are on the mobile device

List Filter

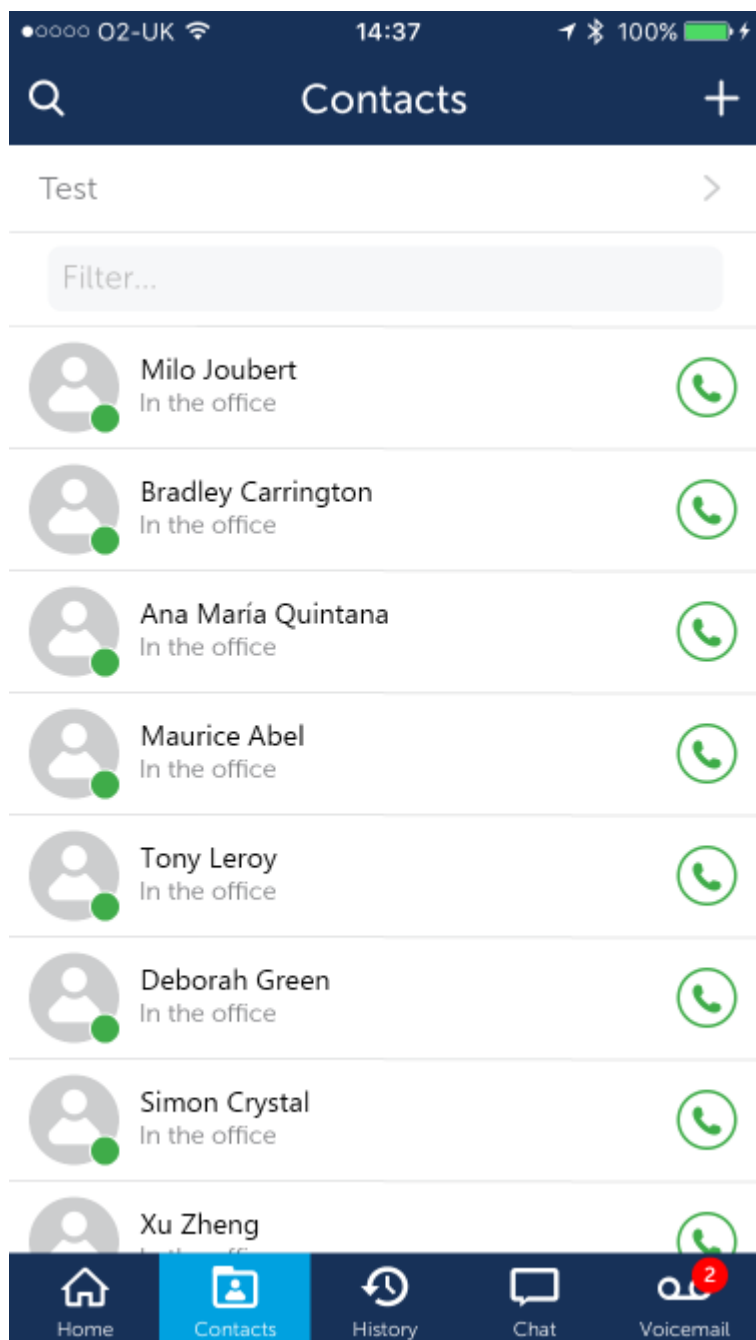
At the top of the contacts screen is a drop down list that allows you to filter the view to a specific type of contact:



The items displayed in the list will vary depending on the business units and global directories that have been configured on the server. The table below outlines the different icons that dictate the different contact types:

	Business Units, each element in the list with this image represents a department or team within the organization.
	Global or Personal contact.
	Favorites list
	Mobile Phone Contacts

In the image below the test business unit has been selected and the view has filtered to just show users in business unit.




Free Filter

To filter the view further a name or number can be entered into the filter text box located under the filter list. This will filter the currently selected list.

3.3 History

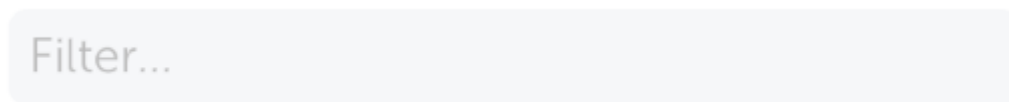
The call history screen shows any calls that have been made from or to any of your physical extensions on the telephone system for up to the last 3 months.

 This does not include calls that have been made using 'This device' as a dialing option. These calls will be visible in your mobile phones call history.

The tab strip at the top of the History screen can be used to filter the view to show All, Missed, Dialed or Received calls:



To filter the call history further, numbers and names can be entered into the Filter box:



To redial a number or contact on the call history press the green dial button to the right of the entry or select the entry itself to open the contact view:



If there is only a number and no matching contact, select the line in the history, this will take you to the contact details page where you will see a '+' icon in the top right hand corner, this can be used to create a new contact. Any contacts added in this way will be added to your Personal Directory on the server.

Missed calls will appear in red and where possible the user, contact name or external name will be displayed.

3.4 Chat

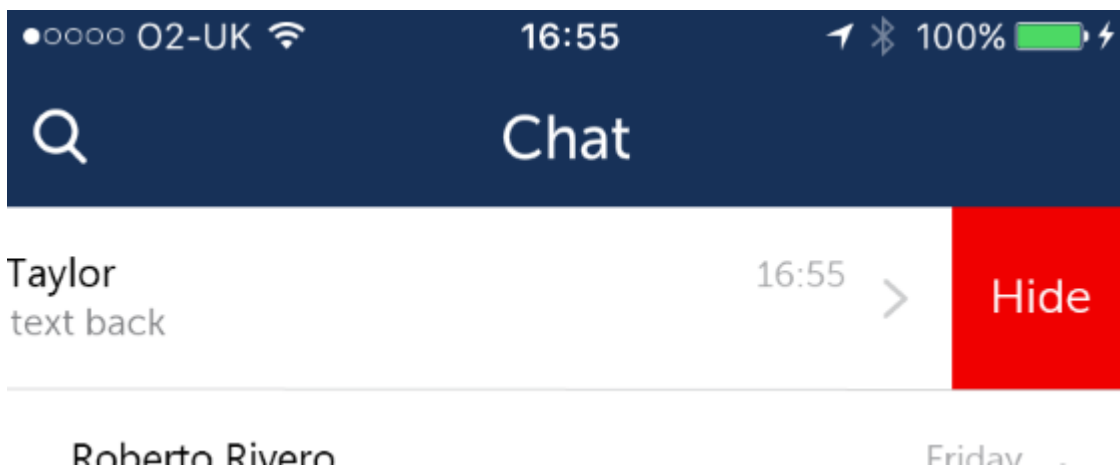
The Chat screen allows you to respond to incoming chat messages or continue existing chat conversations. Any unread message will be indicated by a badge on the Chat tab icon.



To start a new chat conversation, you need to locate the user from the [Favorites](#) or [Contact](#) screen.

Chat messages read on Phone Manager Mobile will be marked as read on Phone Manager Desktop and visa-versa. Chat conversations are available from both client types and can be started on one and continued on the other as required.

Previous chat conversations can be hidden by swiping left across the conversation from the root Chat screen. This will display the 'Hide' button which can be pressed to remove the conversation from the screen.




3.5 Voicemail

If there are any voicemail messages alerting your primary extension, then they will be shown as a badge on the Voicemail tab at the bottom of the screen.



Pressing the Voicemail tab will make a call into your mailbox on the telephone system to retrieve the messages. Depending on how the call is being made (This device, OfficeLink etc) you may or may not have to enter your mailbox and passcode manually.

 To access the Voicemail externally it is important that the Voicemail DID has been configured against the node programming on the server.

3.6 Search

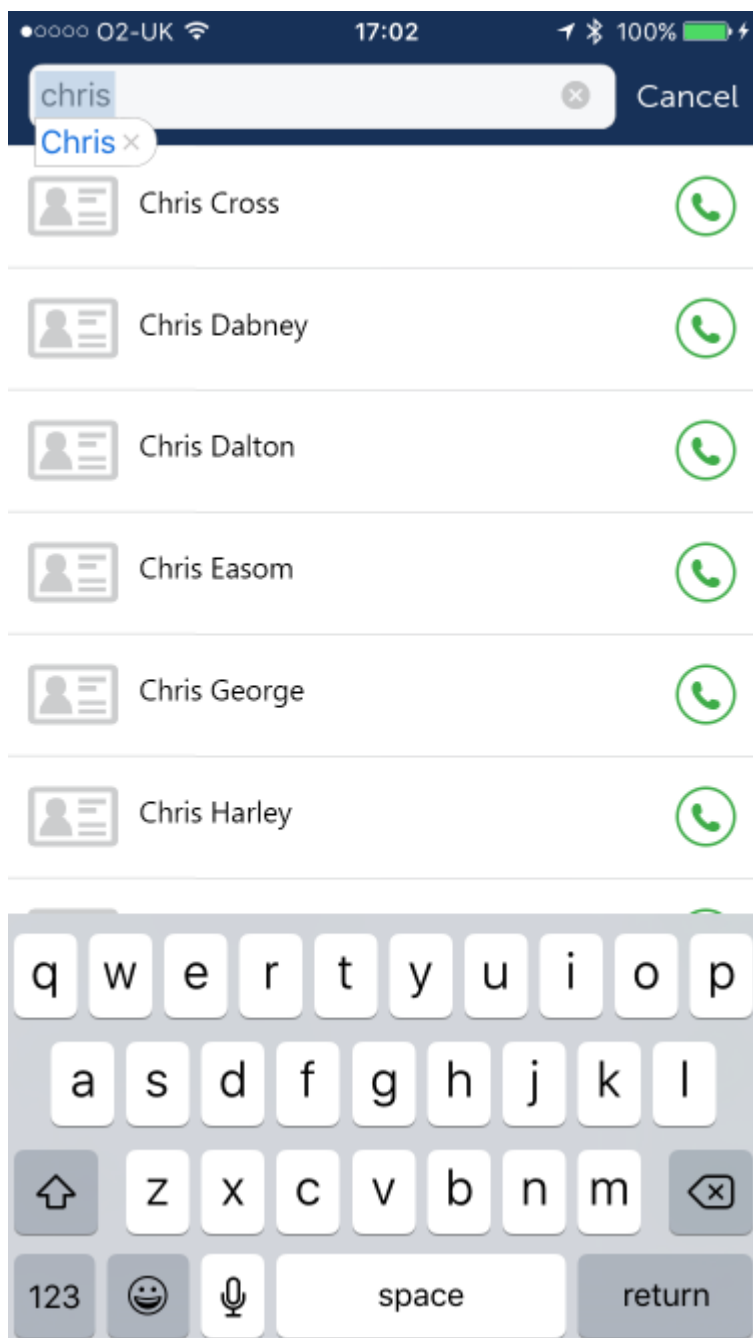
The search screen is accessible from all top level areas of the application. It can be access by pressing the magnifying glass icon at the top left corner of the screen.



The following contacts are searched by the application:

- Other Users
- Global Directories
- Personal Directories

From the search screen contacts can be dialed immediately by pressing the dial icon or the contact record can be opened directly to get access to chat and email functionality.



3.7 Notifications

Phone Manager Mobile has no persistent connection to the server (MCS) and relies on the notification services of iOS/Android to provide updates on user and device status.

Notifications from the MCS to the Phone Manager Mobile client provide:

- Text base information of the notification
- Sound based alert to draw your attention to the phone
- Badge update to display the number of outstanding items that require attention

Notifications appear to the user in different ways depending on the configuration of the mobile OS. They control the badge that appears on the application launch icon. This badge is the sum of all unread chat, missed calls and voicemails.



Any of the notification types below can be disabled if not required. When disabled, the notifications will still be sent to the mobile client to keep the badge up to date on the application but the notification will not be visible to the user in any other way.

Call Routing


When calls are routed to your mobile device's phone number from the office the MCS will send a notification to provide information on who is calling. This is handy when the CLI of the caller may not be presented because of restrictions on trunk line Caller ID presentation.

If the application is already open when a Call Routing notification is received then it will display as message box on the screen.

Chat

When any new chat messages are sent to you, Phone Manager Mobile is notified by the MCS.

If the application is already open when receiving the notification the badge above the tab tool bar icon will update. If the application is closed and launched from the notification, Phone Manager will open the chat message directly.

 Chat notifications can be disabled temporarily based on Presence Profile configuration if required.

Missed Calls

Phone Manager Mobile will receive notifications of any calls that alert the primary device and are not answered by any of the user's devices.

Voicemail

If any voicemails are left in a user's configured voicemail box then notifications will be sent to Phone Manager Mobile. Notifications are only sent for individual voicemail message and not extension or group messages.

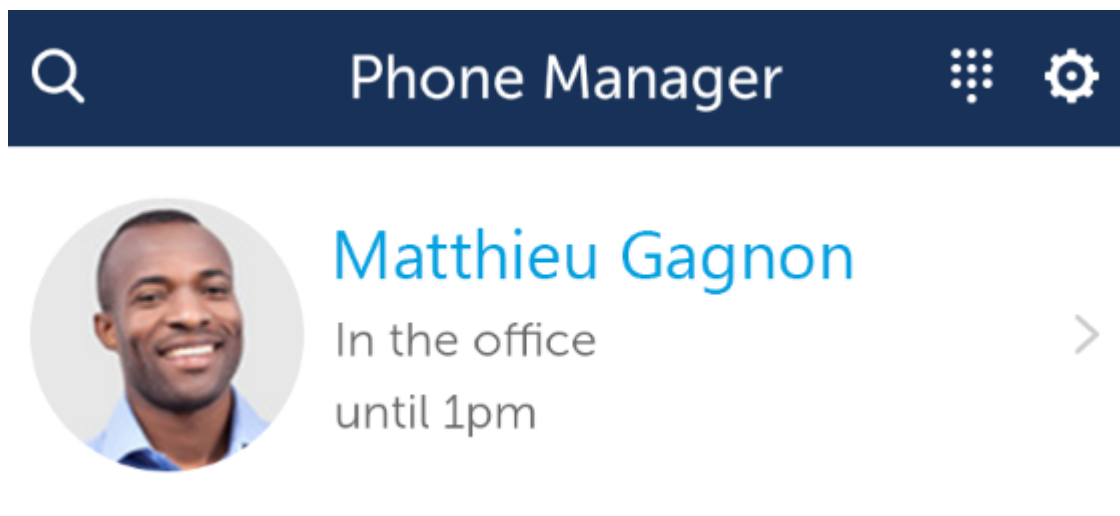
3.8 Presence Profiles


Presence Profiles provide a mechanism for controlling many aspects of your extension. You are given a default set of profiles that you can add to, edit or delete as required.

Profile information

Each profile has a name which will be visible to other users of Phone Manager when it is selected. The profile name can then be supplemented with Additional Information that can be changed as required and will also be visible to other users.

For example, the profile 'In the office' could be supplemented with 'until 1 pm' to provide other users with more information about your status.



 If the profile selected is configured to enable DND then the Additional Information will be added to the DND status text on the telephone system.


Extension Control

Each Presence Profile can control the following aspects of your extension's status:

- Do Not Disturb
- UCD Hunt Group Status
- Forwarding
- Dynamic Extension Express - This is a personal routing feature of the telephone system that allows you to have more than one of your devices ring at a time.

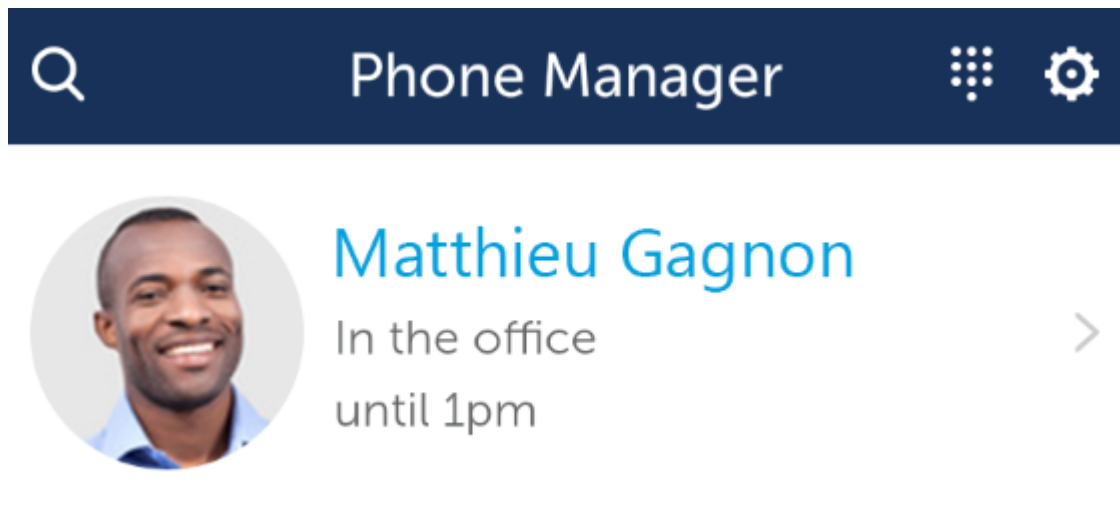
When a profile is changed, any extension status changes are applied to your primary extension and any extension you have a Phone Manager Desktop application connected to (apart from the DEE control which is only applied to the primary extension).

For more information on Presence Profiles, read the section on [Editing Presence Profiles](#).

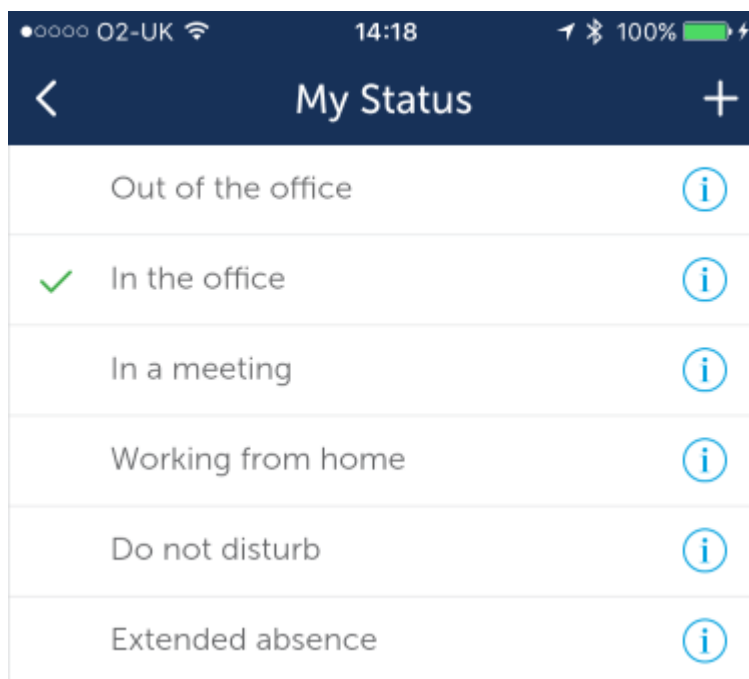
 Presence profiles can only control whether each of your devices is active or not (will ring or not). Configuration for what order they ring in must be made on the phone system.

Using Presence Profiles

The currently in use profile is visible under the username at the top of the main Phone Manager window. To select a different profile, press to the right of the current profile and select the new profile to apply:



A list of your currently configured profiles will then appear. A tick mark will be shown against the currently selected profile. Another profile can be enabled by pressing on it's description.



A new profile can be added by pressing the '+' icon in the top right-hand corner or existing ones can be editing by pressing the 'i' icon to the right of a specific profile.

For more information on Presence Profiles, read the section on [Editing Presence Profiles](#).

3.9 Editing Presence Profiles

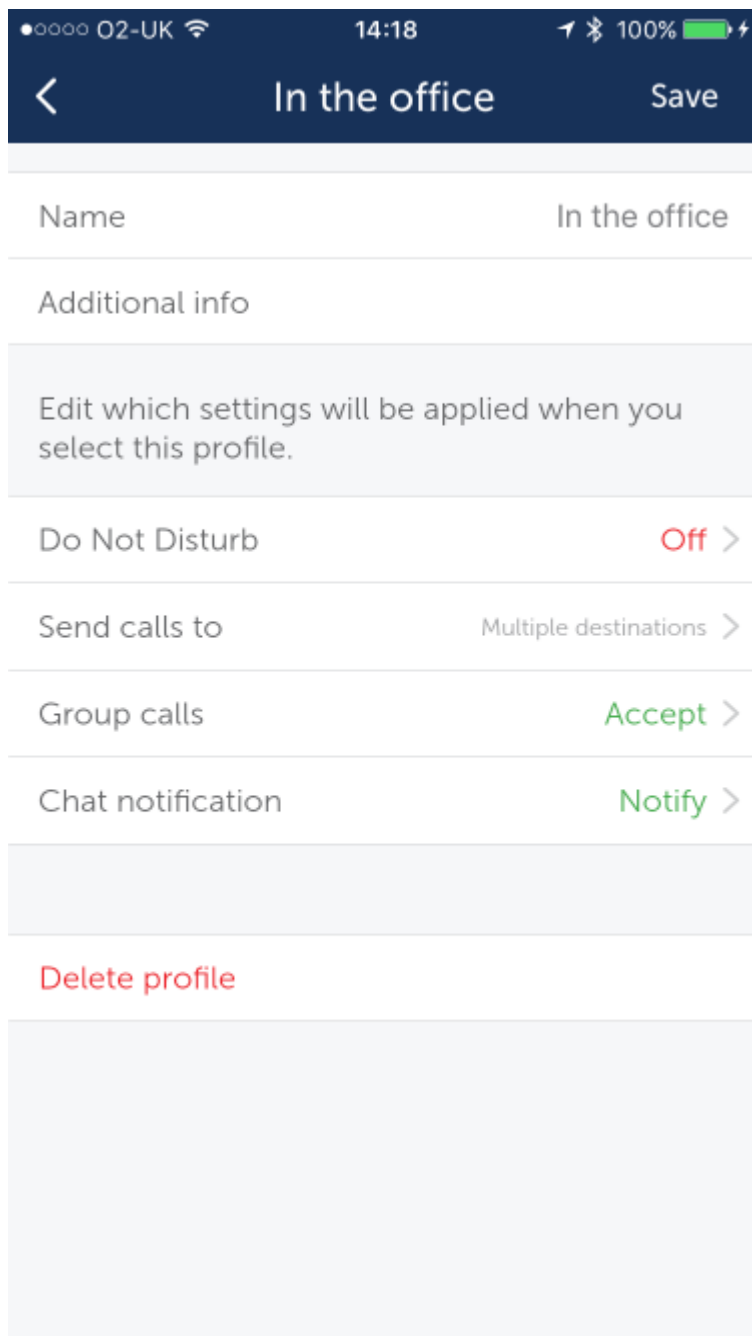
Default Profiles

When first using Presence Profiles a default set of profiles will be visible:

In the office	Default profile, enables all of a user's DEE destinations, no DND, no Forwarding, Group Calls (UCD) enabled
Do Not Disturb	All DEE destinations enabled, DND set to on, prompt on selection. No Forwarding, Group Calls (UCD) disabled
Out of the office	External DEE destinations enabled only, no DND, no Forwarding, Group Calls (UCD) disabled
In a meeting	Only Voicemail DEE destination enabled, DND on, no Forwarding, Group Calls (UCD) disabled
Working from home	Only Voicemail DEE destination enabled, DND off, Forward Immediate with prompt for the destination, Group Calls (UCD) disabled
On holiday	Only Voicemail DEE destination enabled, DND on, no Forwarding, Group Calls (UCD) disabled

Adding/Editing Profiles

Each profile can be edited as required or new profiles can be added if needed. The following section outlines each area of a Presence Profile:



Description: The description of the profile. This will be used to choose the profile when applying it and will also be visible to all other users to define your status.

Additional Information: Supplementary information to the description, this can be permanently set here or edited on the main Phone Manager screen after the profile has been selected.

Prompt on selection: If required, Phone Manager can be configured to prompt for the Additional Information each time the profile is selected.

Send calls to: Outlines where inbound calls should be sent to. There are three options to choose from:

My ring group	When selected, each of the DEE destinations that have been configured on the telephone system will be shown. Destinations can be configured
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	to ring or not by checking and un-checking the relevant boxes. Note: If 'My ring group' has been selected, at least one destination must be set to ring.
Voicemail	Applies a forward all calls to Voicemail
Other	Allows the user to configure where their calls should be forwarded to. If required the destination for the Forward can be prompted for when the profile is selected.



If the profile selected is configured to enable DND then the Additional Information will be added to the DND status text on the telephone system.

Do not disturb: Enables or disables DND. A specific DND message can be selected or Phone Manager can be configured to prompt for the DND message at runtime. Any Additional Information will be used as the DND Text property when setting the DND status on the telephone system.

Group Calls: Controls whether UCD removed/replace feature. When enabled, the primary extension will receive calls from any UCD hunt groups it has been added to.

Chat Notification: Controls whether the chat notification audible alert gets played or not.

Deleting Profiles

Presence Profiles can be deleted as required, however the currently selected profile cannot be deleted so that there will always be one profile remaining.

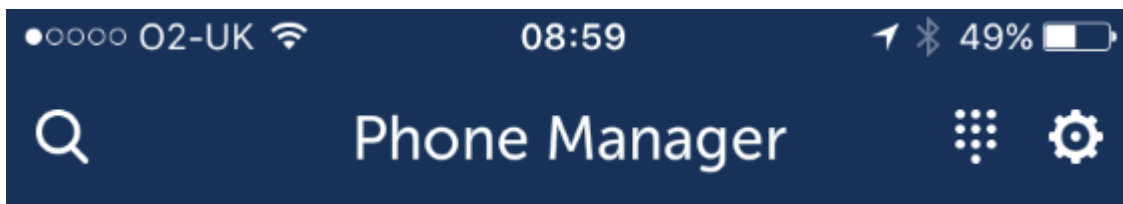
3.10 Softphone

Overview

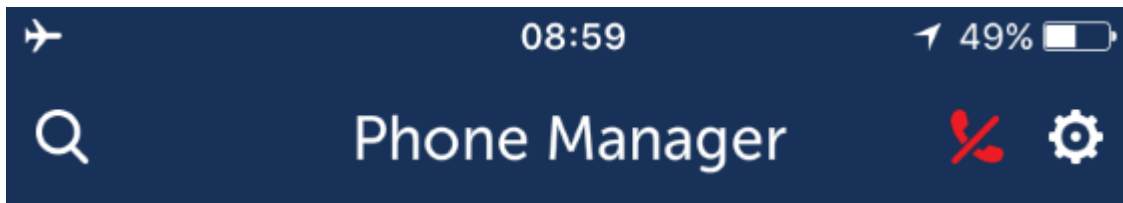
The softphone provides an internal extension off the telephone system, whether you are in or out of the office. The main benefits for this are:


- You can transfer calls internally
- You can make calls over WiFi when traveling
- You can answer group calls from the telephone system

If the softphone has been enabled, a dial pad icon will be visible next to the settings icon at the top right-hand side of the screen:



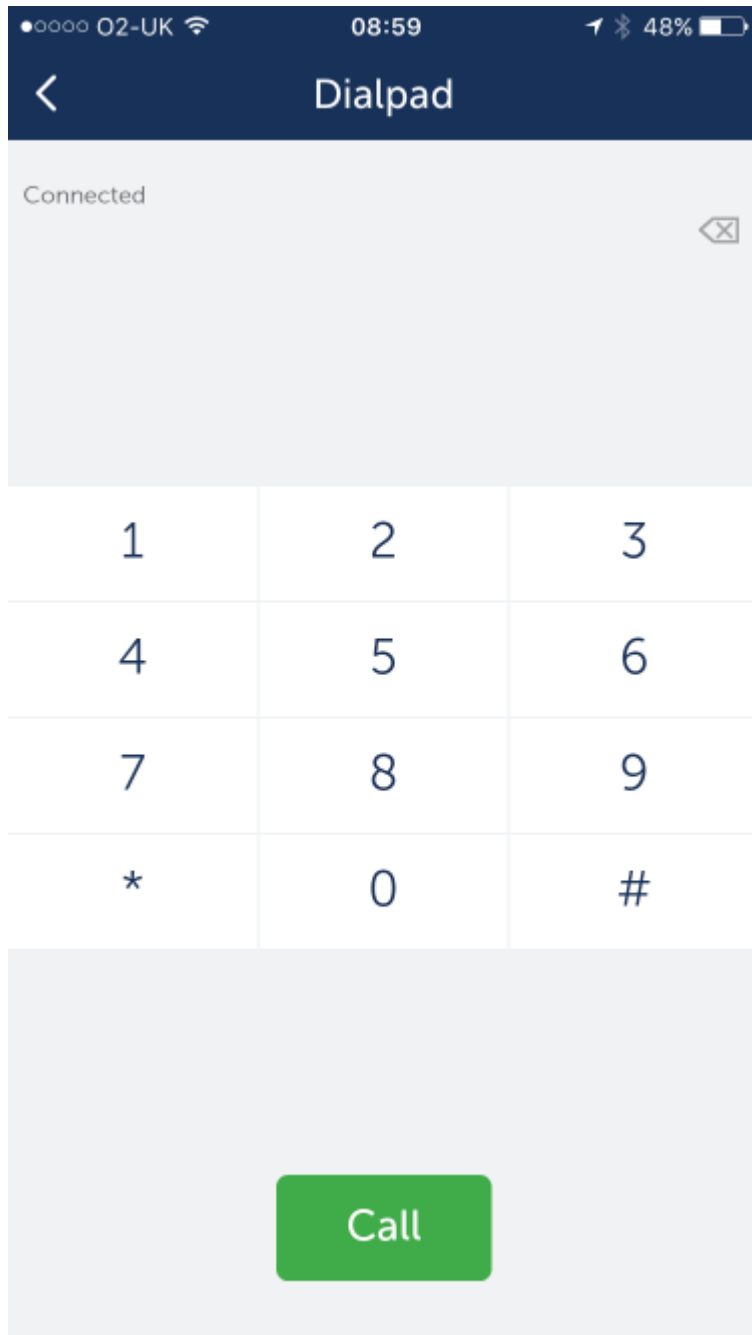
If the softphone is enabled but cannot connect or there is no data connection available then this icon will display instead:



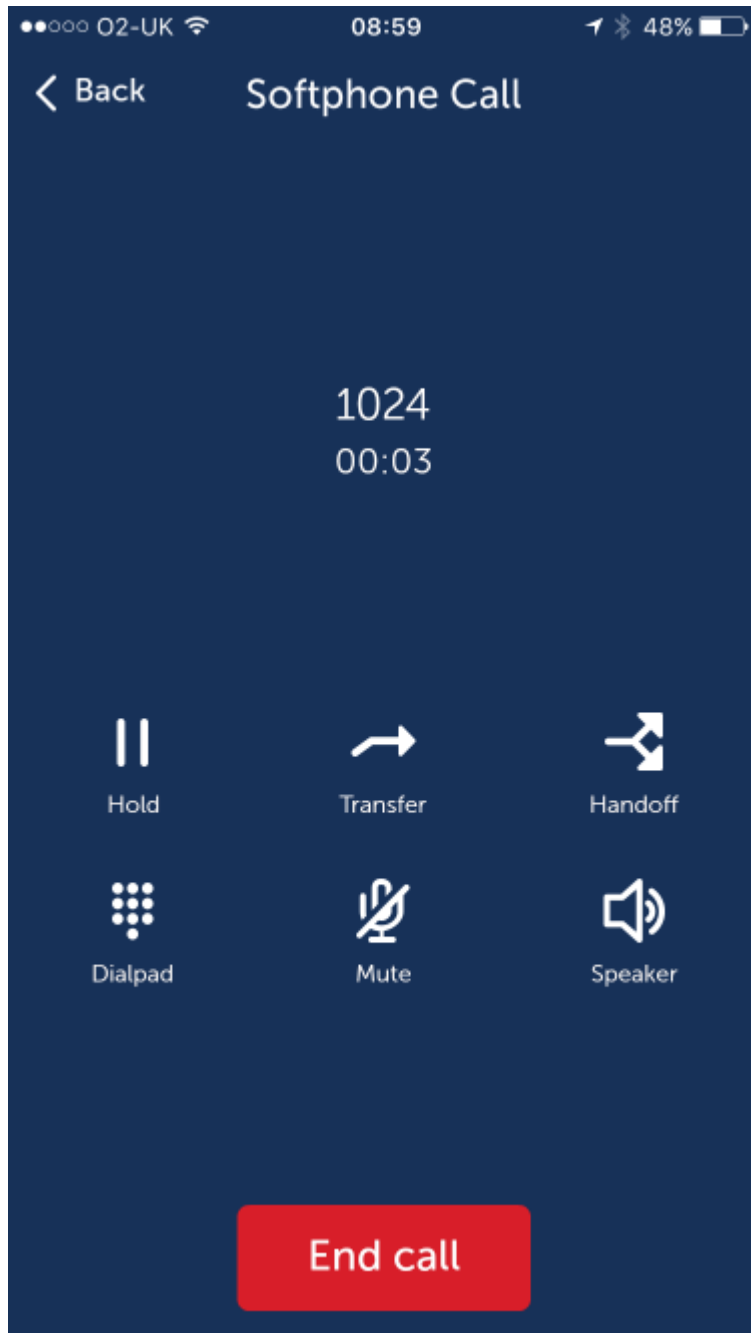
 If a call is received on the cellular network while on a softphone call the audio for the softphone call may be cut off.

Making Calls

Calls can be made by any of the normal methods (from favorites, contacts screens, call history etc), there is also the dial pad option when the softphone is enabled.



Pressing the 'Call' button will initiate a call using the softphone. The in progress screen will then be shown.



Hold -> Used to toggle calls in and out of the held state


Transfer -> Used to transfer call to other contacts

Handoff -> Used to pass a call back to your configured Failover Device

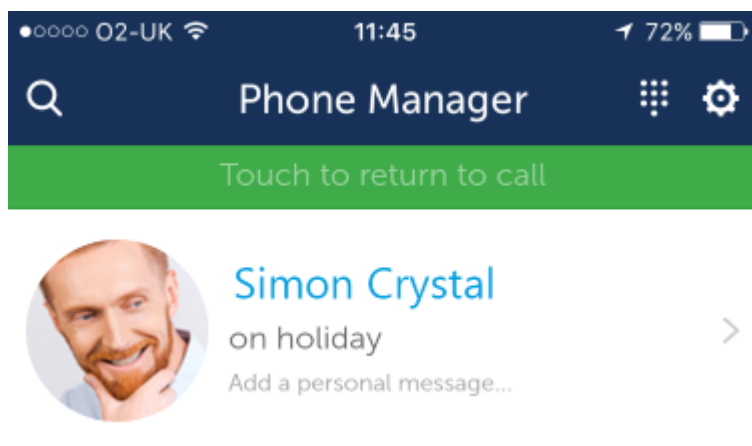
Dial Pad -> Used to dial DTMF over a call in progress

Mute -> Used to toggle calls in and out of the muted state

Speaker -> Used to toggle calls between the speaker and the phone (and the headset if connected)

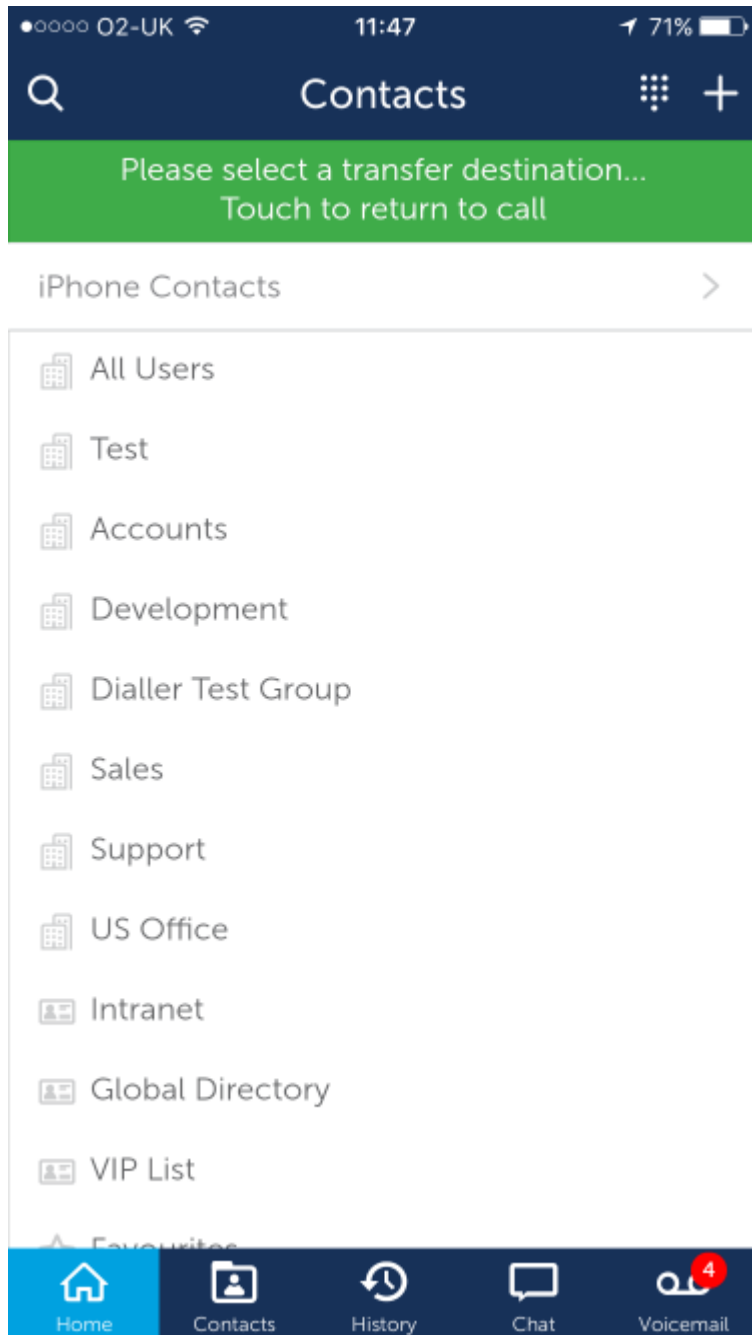
 Due to close proximity of the speaker and the microphone it is recommended to limit the use of the speaker to dialing into voicemail or when on hold to stop acoustic echo interfering with your call

Pressing the back button will take you back to the main application. Whilst a call is in progress on the softphone a green banner will display at the top of the screen to allow you to get back to the call:



Transferring Calls

Calls can be transferred to any of the Contacts available on the phone. Pressing the Transfer button will cause the Contacts view to display:



Select a contact to transfer the call to form the list or press the green banner at the top of the screen to return to the call.

Call Hand Off

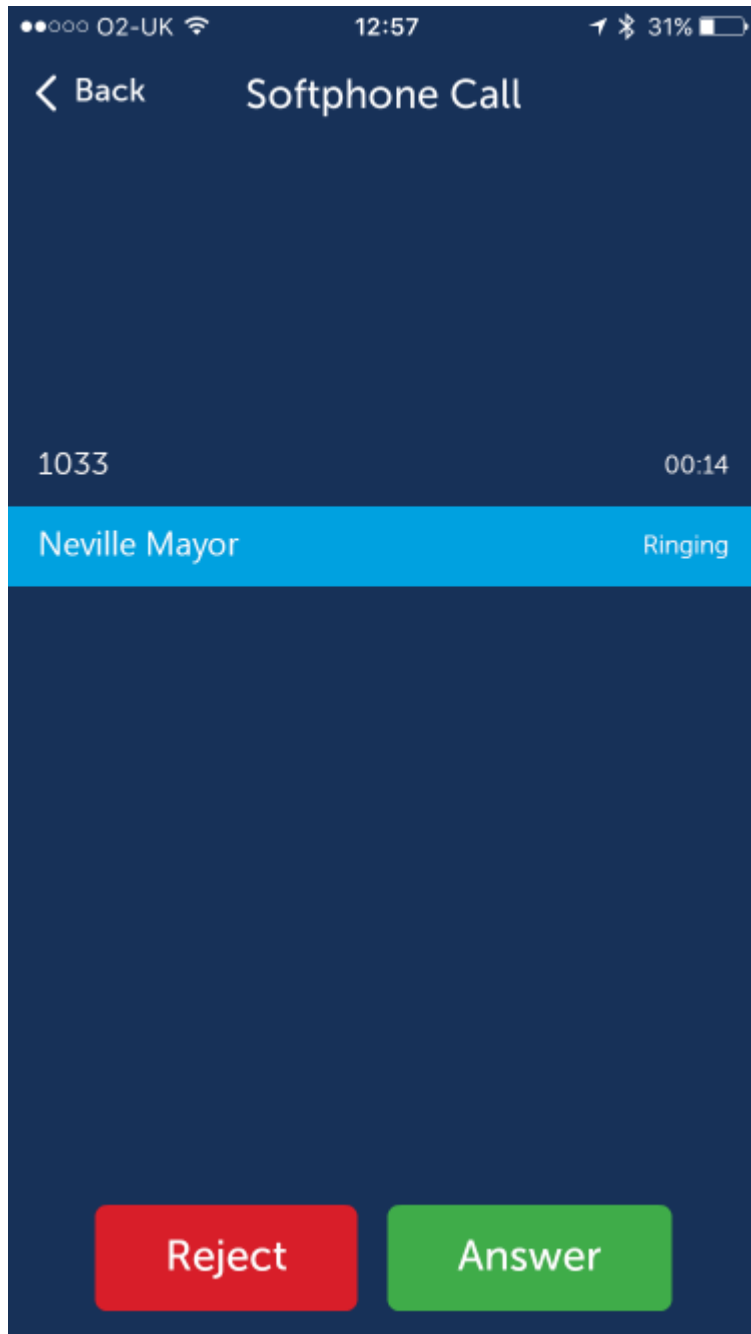
While on a softphone call it is sometimes necessary to transfer the call to one of your other devices. Pressing the 'Hand Off' button will cause the call to be transferred to your primary device. The call will then follow whatever routing you have configured with the current Presence Profile to alert your devices.

Handling Multiple Calls

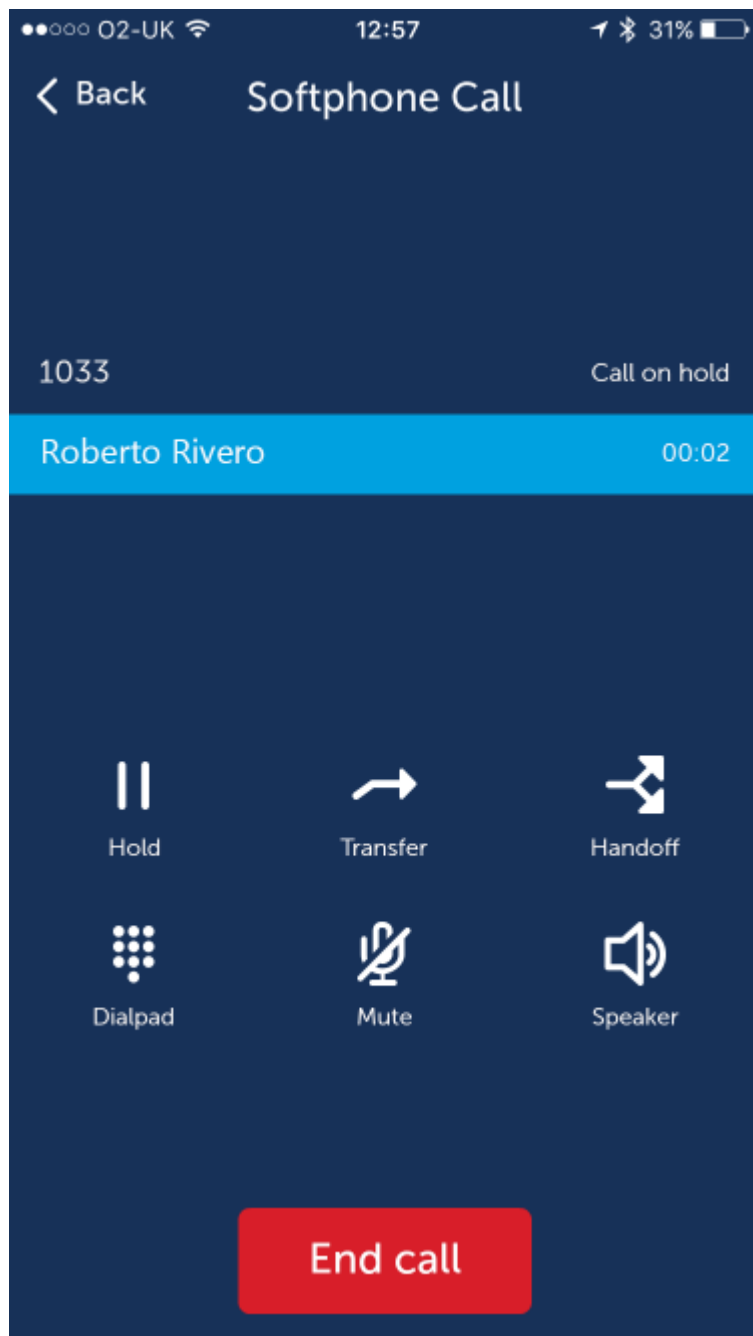
When transferring calls or when receiving softphone calls when already on the phone it is possible to have more than one call at the softphone at a time. When this happens the call progress screen changes to show

the calls on the softphone and the state they are in.

When receiving a call whilst already on the phone the option to reject or answer the call appears. Answering the call will cause automatically put the existing call on hold.



Once there are two or more calls in progress the call progress screen shows all calls. The call currently in the connected state will be indicated with a light blue highlight. To swap to a new call simply press on the call in the list. The existing connected call will automatically be held.



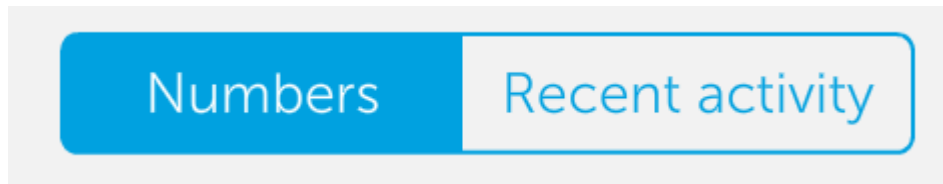
 There can be up to four calls in progress at any point in time on the softphone.

3.11 Contact Record

Individual contact screens can be opened by selecting a contact from Favorites, Contacts, History or by using the Search facility. The individual contact screen varies slightly between contact type.

Contact Details

On each type of contact screen there is a tab to switch between contact numbers and recent history:



The recent history shows most recent calls to or from this contact.

Favorites

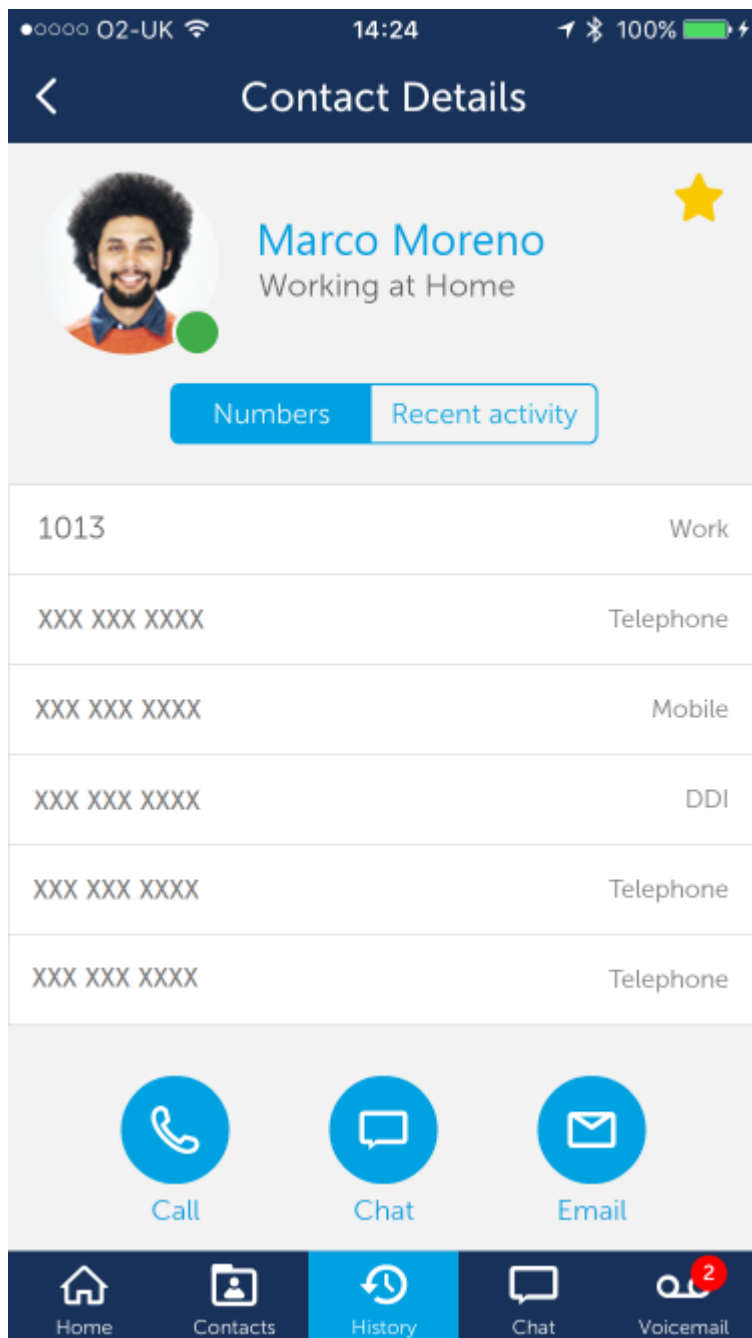
Apart from an Unknown contacts, all contact types offer the option to be added to your [Favorites](#). If the star on the contact is outlined blue it is not yet a favorite. Pressing the star will cause it to turn yellow and be saved in the favorites list on the [Home](#) screen and on Phone Manager Desktop.




Each of the different contact screen types are shown below:


User Contact

This is the contact screen shown when looking at another Phone Manager user. If the user has set a profile image it will be visible along with their current status. If the user is using Presence Profiles then their current profile status will be visible below their name.



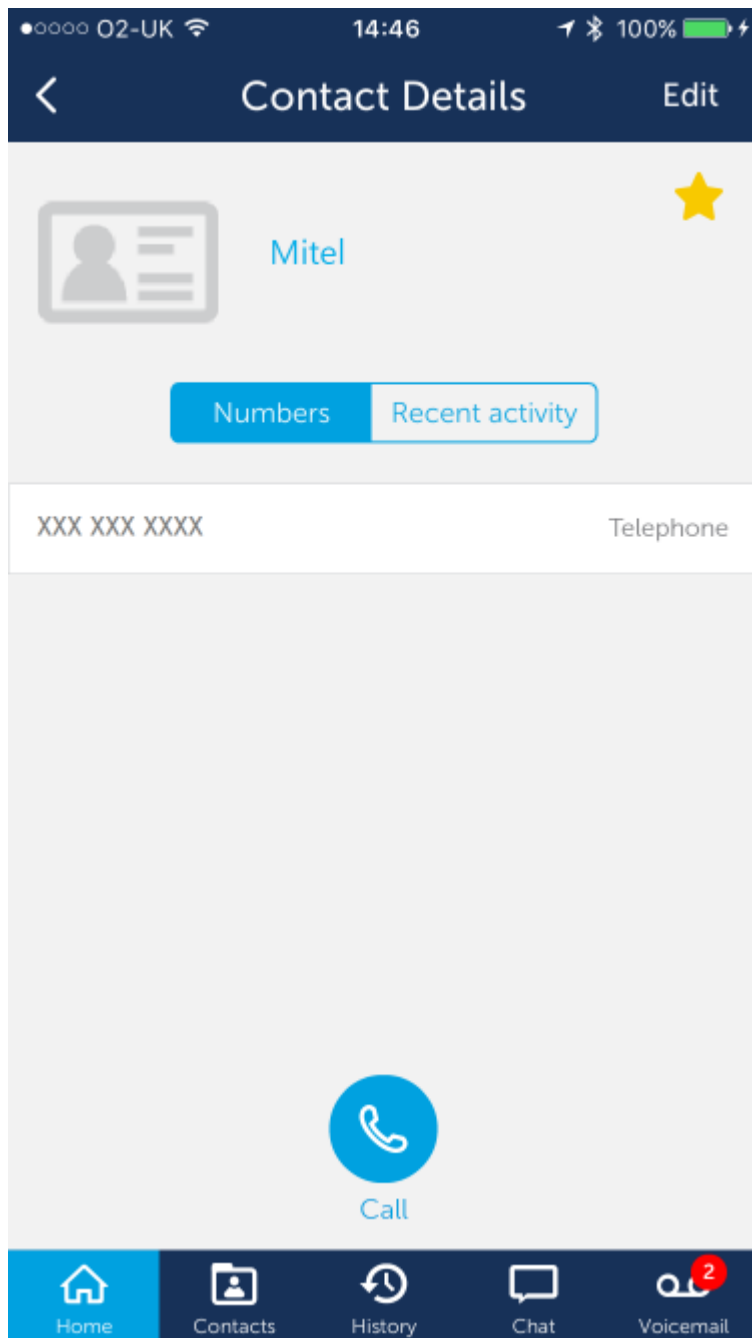
From a user contact screen you can call the user, initiate a chat conversation or send them an email. Pressing the call button will ring the user's primary extension, this should then follow any routing they have configured to send the call to the correct location. Alternatively, selecting one of the numbers in the list will cause a call to be placed directly to that number.

 Sending an email will cause the mobile's default email client to be opened. To email a user they must have entered their email address in their personal preferences.

 The status of users is a snap shot in time from when the contact screen was opened, it will not dynamically change as their status changes

Directory Contact

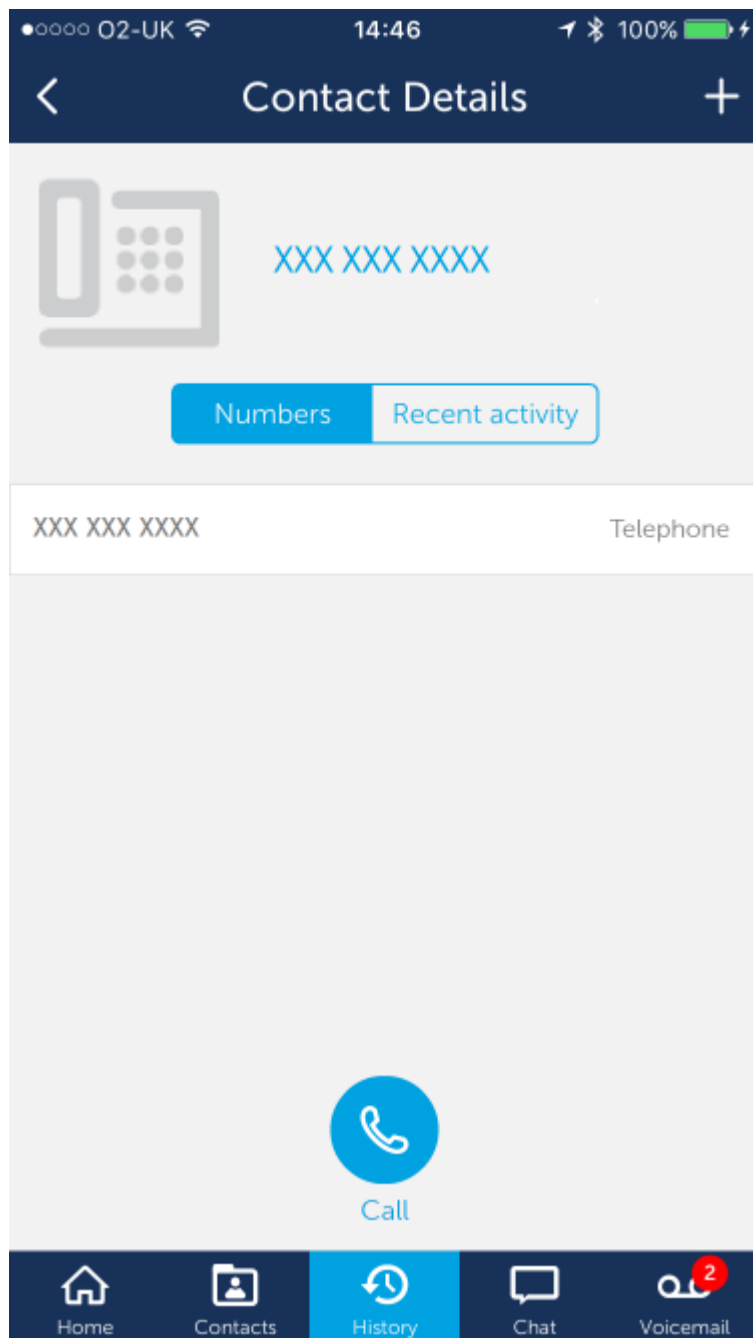
This is a contact record of a personal or global directory item. To edit the contact press the 'Edit' option in the top right-hand corner of the screen.



Unknown Contact

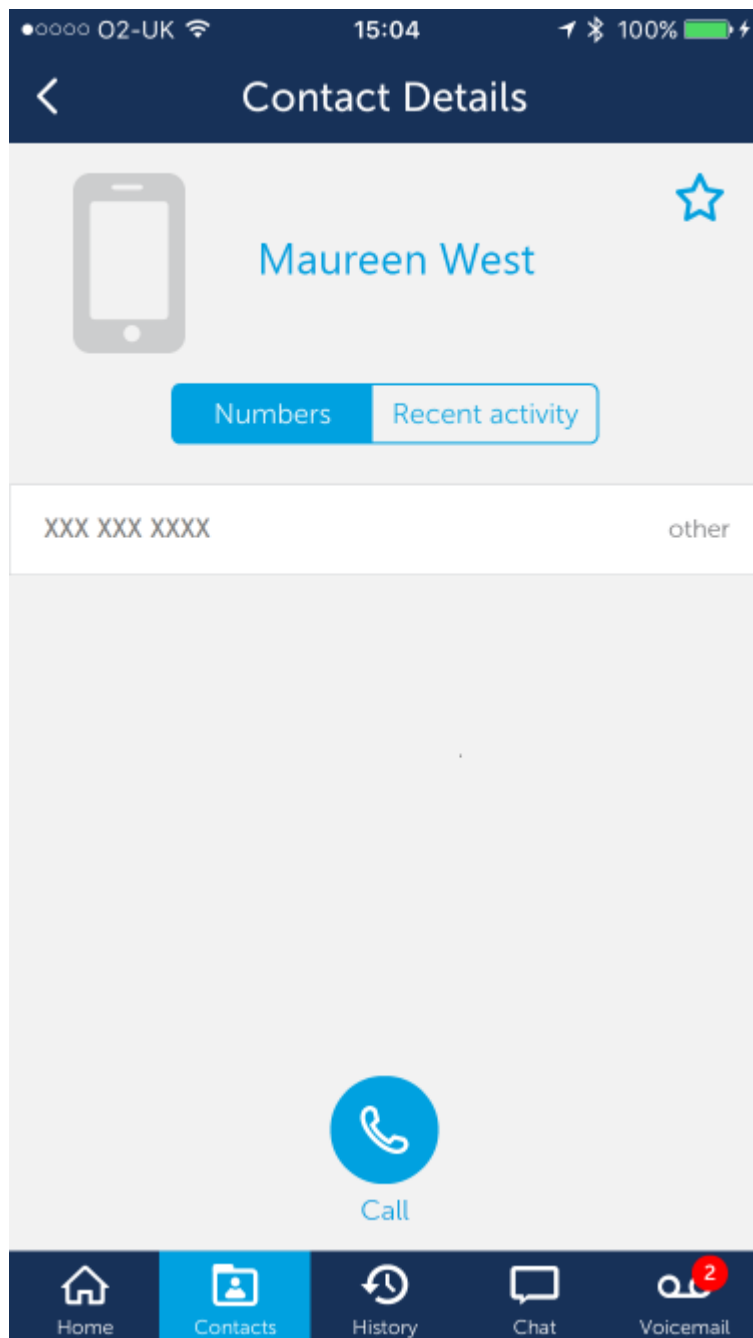
This is an Unknown contact screen. This will be displayed when viewing an item on the call history where there is no contact match. To create a new personal contact using the telephone number press the '+' icon in the top right-hand corner.

Unknown contacts cannot be added to favorites until saved as a personal contact.



Mobile Contact

This is the contact screen shown when viewing a mobile phone contact. These contacts can be added to favorites but will not be visible on Phone Manager Desktop.



4 Settings


4.1 Connection settings

Server Connection

The Server Connection settings are the most important of the application. They tell the application how to communicate with the Mitel Communication Service which is essential to successful operation of the application.


Server

This should be the IP Address or hostname of the server running the MCS application on the internal corporate network.

 When operating in an Active Directory environment the Server setting should be set to the DNS name of the server.

Remote Server

This is the IP Address or DNS name for accessing the server remotely when outside the corporate network. This setting will populate automatically once a successful connection to the MCS has been made on the corporate network.

 The hostname/IP address configured here must match the certificate that is being used on the server.

Username

This should be configured as the username associated with your user account on the MCS. If connecting with your domain credentials then please enter the username in the following format: {DOMAINNAME}\{Username}

Password

This should be configured as the password associated with your user account on the MCS.

SSL Certificates


Phone Manager Mobile connects to the MCS on a secure connection and requires a certificate in order to communicate. If the MCS server has not been configured with CA based certificate then a self-signed certificate must be downloaded from the MCS while on the corporate network.

To install the certificate click on the orange link and then follow the instructions for your particular mobile phone's operating system:

Apple iOS Certificate Installation

When clicking on the link the following screen will appear:

Select the 'Install' option in the top right-hand corner.

 The name of the server will be different than the one depicted in the screen shot.

Apple iOS 10.3 Onwards

From iOS 10.3, Apple have increased the security on self-signed certificates. If you are having problems on iOS 10.3, please follow these steps:

On the iPhone, Navigate to 'Settings -> General -> about'. At the bottom of this list is an entry labeled 'Certificate Trust Settings'. In this section there are toggle controls for the installed certificates. Locate the certificate for the MCS server and enable it.

4.2 Preferences

Profile Image

The profile image configured here is visible to all other Phone Manager users, both desktop and mobile users. You can change the profile image as often as you like. Phone Manager Mobile will scale the photo down and will crop the image to a circle from the center of the photo.

Mailbox Number

The mailbox number used on the phone system, this is usually the same as the primary extension number.

Mailbox Passcode

The passcode for accessing the configured mailbox number. When configured, Phone Manager will automatically enter the passcode when access the mailbox.

Meet-Me Access Code

If Meet-Me conferencing is being used on the phone system, the access code entered here will be used to pre-populate meeting invitations (Phone Manager Desktop only).

External Direct Dial

This number is your DID on the telephone system that allows external caller to ring you directly. This number should be configured if you have so that it is easier for Phone Manager Mobile users to get hold of you.

Outside Numbers

This section allows you to program any other numbers that you may have which you wish other users to be able to see.

4.3 Notification Settings


This section of the application's settings can be used to control which of the possible notification should be sent. For more information on the Notifications please refer [here](#).


4.4 Softphone Settings

Phone Manager Mobile can become an extension off the telephone system using the built in SIP softphone. If a Phone Manager Softphone license has been assigned to the user then the Softphone can be enabled as and when required.

Phone Vibrate


This setting is on by default and determines if the phone will vibrate when you get in app notifications (e.g. ringing or new chat).

 Note it does not alter the behavior of OS notifications when the app is not running - these are controlled by the OS phone settings and therefore these can vibrate even when this setting is off.

 The volume level of the softphone ring and audio is controlled by the media volume of the phone not by the ringtone volume

Endpoint Selection

This is the extension that Phone Manager Mobile will register as with the telephone system. A list of your possible softphone devices will be shown here with a check mark against the one currently being used.

 The list of extensions is generated from SIP devices assigned to the user's DEE user on the telephone system

Failover Device

If you lose your data connection while on a softphone call the server can transfer the call back to you. The device select here will be the target of that transfer. The normal configuration for this is to transfer the call back to your primary extension, this will ensure the call follows your predefined routing and should find you again on whatever device you are on.

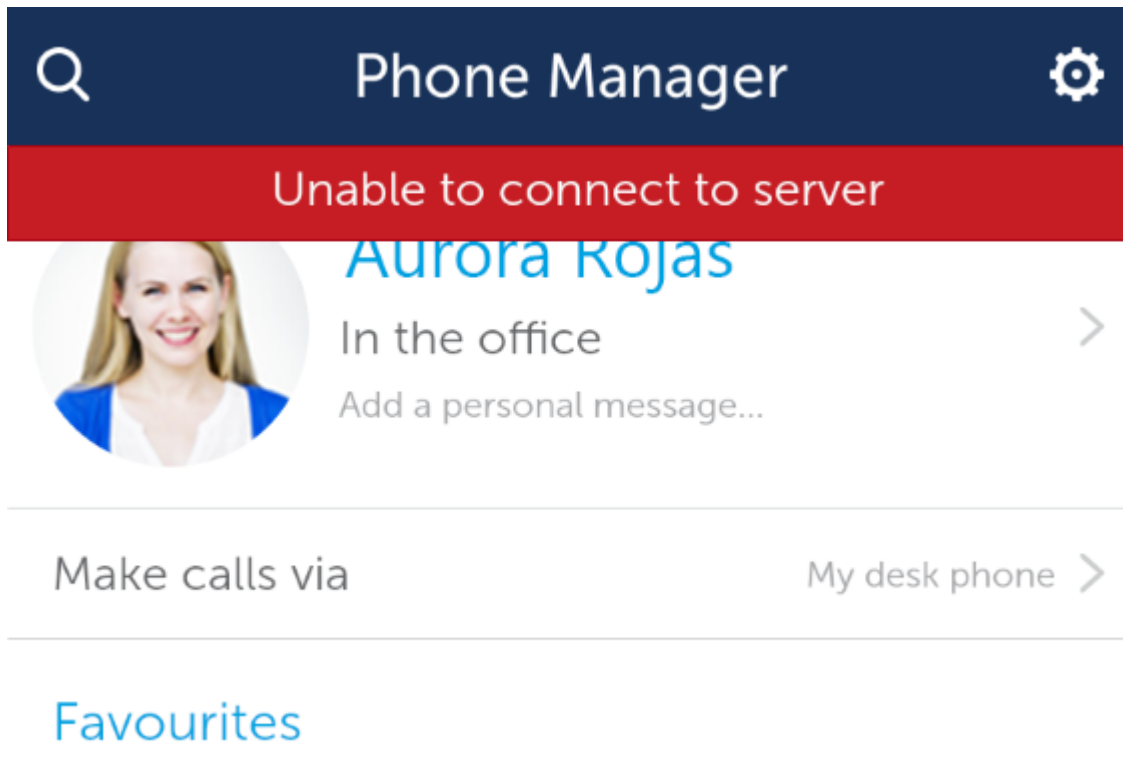
To disable this feature select '(None)' from the list.

4.5 Diagnostics

If instructed by an engineer you may need to enable diagnostics. With diagnostics enabled the software will log operations to a file that can be viewed at any time. With diagnostics enabled the client may run slightly slower than normal due to the extra logging. It is advisable only to enable diagnostics when instructed to do so and turn it off as soon as it is no longer required.

4.6 Connectivity Problems

Phone Manager Mobile will automatically detect whether you are connecting from inside the office or externally. If at any time Phone Manager has a problem connecting to the server then a message will display at the top of the screen as shown below:



The most likely cause of this message is that the mobile phone has no data connection with which to connect back to the server. When this happens the following features of the application will still be available:

- You will be able to dial contacts on your Favorites view (using 'This device' as the method)
- You will be able to see and dial entries in your Call History that have already loaded.

All other features will be restricted until a valid connection to the server can be established.

iOS 10.3 Onwards

From iOS 10.3, Apple have increased the security on self-signed certificates. If you are having problems on iOS 10.3, please follow these steps:

On the iPhone, Navigate to 'Settings -> General -> about'. At the bottom of this list is an entry labeled 'Certificate Trust Settings'. In this section there are toggle controls for the installed certificates. Locate the certificate for the MCS server and enable it.



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