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ShoreTel Communicator for Windows: Importing the Active Directory Global Address List

September 18, 2014

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Table of Contents

Chapter 1	Overview
Chapter 2	Configuration
	Enabling the Import of Active Directory Address Lists 8 Security and Permissions 10 Select Folders for Import 11 Working with Active Directory Contacts in ShoreTel Communicator 12 Quick Dialer 13 Directory Window 13

CHAPTER

Overview

ShoreTel Communicator downloads the Global Address List (GAL) contacts from Active Directory and integrates with Quick Dialer and the Directory window.

Users' contacts include Active Directory contacts and shared contacts of Microsoft Outlook.

This guide includes the following sections:

- Enabling the Import of Active Directory Address Lists on page 8
- Working with Active Directory Contacts in ShoreTel Communicator on page 12
 - Select Folders for Import on page 11
 - Quick Dialer on page 13
 - Directory Window on page 13

CHAPTER



Configuration

This section describes the process for importing and working with GAL contacts in ShoreTel Communicator.

"Enabling the Import of Active Directory Address Lists" on page 8

Enabling the Import of Active Directory Address Lists

To enable Import of AD Address Lists:

- 1. From the ShoreTel button, choose Options.
- 2. From the Options and Preferences window, click **Outlook**. The Outlook page is displayed.
- 3. Check Import AD Global Address Lists.

6	8476 - ShoreTel Communicator		
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Options and Preferences			
- options and references			
My Phones	Outlands		
My Phones	Outbook		
Incoming Call Routing	Contact Unload		
Call Handling Mode			
Standard	V Import AD Global Address Lists Import Options		
In a Meeting	V Unload Outlook Personal Contacts		
Out of Office	opidad Obidad Opidad Opidad Opidad Opidad Opidans		
Extended Absence	Open Outlook contacts when calls arrive		
Custom			
Personalized Call Handling	Voice Mail		
Voice Mail	Voice Mail integration with Outlook is not currently installed. Install		
Escalation			
Calendar Calendar			
Telephany	The Outland and interests to design Collige the Made		
relephony	W Use Outlook appointments to change Call Handling Mode		

Figure 1: Import Exchange Address Lists

4. Select Upload Options to display a new window with tabs for Upload Schedule and Upload Configurator.

Figure 2: Upload Scheduler

Upload Schedule Upload	Configurator
Initiate upload:	
🔘 On startup	0
Oaily at	1:00:00 PM 🗘
Manual	
Read	contacts now
OK	Cancel Apply

- 5. Select the Upload Schedule tab to configure when to update cache or import the contacts:
 - **a. On startup**: Select for ShoreTel Communicator to update cache or import contacts from Active Directory every time Communicator starts.
 - **b. Daily at**: Set a time to request ShoreTel Communicator to update cache or import automatically at the same time every day. By default, the time is set 12:00:00 (time is in 24 hours format).
 - **c. Manual**: Select to manually update or import contacts only by clicking **Read contacts now**. This is recommended for remote or traveling users to reduce network traffic by importing only when they are in the office with good bandwidth, or during off-hours.



Note

If you chose the first or second option, click **OK** to activate the request. Otherwise, select **Read contacts now** to update cache or import contacts immediately. Restart Communicator to activate the **On startup** or **Daily at** imported contacts (**Daily at** becomes available at the time this option was set.)

Security and Permissions

In a Windows corporate deployment, individual computers can be joined to a Domain. If the computer where Communicator runs is joined to the corporate Windows Domain, Communicator will be able to use the credentials of the Windows users to access the Active Directory and view the Address Lists, then download those selected by the users. With the Windows Single Sign-On mechanism, Communicator uses the current Windows token (interactive user credentials) to establish the connection.

Note that the domain administrator controls which Address Lists are visible to the user through Access Control Lists (ACL).

If the Windows machine is not joined to a domain, or is in a different domain than the Active Directory server, your Communicator default credentials will not be not valid. A login popup displays. Use your Windows domain credentials with one of the following formats:

```
Domain\username: yourdomain.com\yourname
```

Domain\username: yourname@yourdomain.com



Note ShoroT

ShoreTel Communicator is unable to connect or download contacts from Active Directory without proper login credentials.

Select Folders for Import

Select the **Upload Configuration** tab. The address lists are displayed in a tree view and are unchecked. Check all nodes of the tree view as desired. Refer to Figure 3 as an example.

Figure 3: Upload Configurator Screen



"Loading database..." displays at the bottom of the Communicator window while importing is in progress. When the message disappears, the contacts show in the Directory window.

Working with Active Directory Contacts in ShoreTel Communicator

Contacts in ShoreTel Communicator are accessible after importing the AD Address lists. This allows you to view contact information in Communicator for users that are not part of the ShoreTel system.



Note

ShoreTel Communicator displays the previously downloaded Active Directory contacts retrieved from the local database in the Directory window.

Active Directory contacts in ShoreTel Communicator are listed in the Directory window. They may be identified because the **Source** column shows "Active Directory" for the imported contacts.

8481	- ShoreTel Co	ommunicator				x
<u>W</u> indows <u>D</u> ial <u>C</u> all <u>T</u> ools <u>V</u> iew <u>H</u> e	lp					
🗠 Primary Phone 🗸 🥌 Standard 🗸 📀 Online 🗣	Windows	•			🕿 🖉	
🦈 Type a name or number						- +
There are no active calls at this time						
Directory						×
<mark>Р</mark> а						×
First Name 🔺 Last Name Company	Extension	Business	Mobile	Pager	Source	-
+Bianca		((408)) 962-3879			Active Directory	
-dission mil		((408) 9452-28886			Active Directory	
10 Service		((\$112) \$51-7087			Active Directory	
phot / Thomas	5229				System Ext.	
Mill: 1991 01	8458				System Directory	
Max Instance	8558				System Directory	-
Contacts History Voice Mail Directory						

Figure	⊿.	Source:	Active	Director	
riguie	4.	Source.	ACTIVE	Directory	∕

Quick Dialer

After completing the previous steps, Quick Dialer provides quick access to CAS and Active Directory contacts, from which you can make a phone call, start an IM session, or send an email. Refer to Figure 5 for example contact information after importing GAL contacts.

Figure 5: Quick Dial Sample Contact

🕒 Make New Call		X			
Type a number or n	ame.Matches are listed below.				
> binh		_			
 binh Trung 	nguyen: TMA: Shoretel				
Extens	ion - 1234				
Busine	ss - <mark>(</mark> 800) 555-1212				
Mobile	- (408) 1 4				
Pager	- 2				
Home	- 22222				
Email -	Email - brown and a formain, com				
Fax - 1	Fax - 1111111				
Primar	Primary Fax - 1111111				
Dial Digits	binh				
Make Call	Silent Coach Dial Mailbox Cano	el			
Barge In	Silent Monitor Intercom Whisper	Page			

Directory Window

Contacts can be imported from Outlook and combined with Active Directory and you can display your Outlook shared contacts in ShoreTel Communicator. Your shared contacts are displayed in ShoreTel Communicator when:

Enabled by your system administrator in ShoreTel Director on the **Administration > Users > Class of Service > Telephony** page.

The option Upload Personal Contacts is selected in Communicator.

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Note

If you want to remove all shared contacts from ShoreTel Communicator and no longer display them, deselect the **Upload Personal Contacts** option.

To display shared contact from Outlook to ShoreTel Communicator:

- 1. Launch Microsoft Outlook.
- 2. From the ShoreTel button, choose Options.
- From the Options and Preferences window, select the Outlook category. The Outlook page is displayed.

- 4. Check the Upload Personal Contacts box.
- 5. Select Upload Options button to display Outlook Contacts folders.
- 6. Select the shared Contacts folders to display in ShoreTel Communicator.

Figure 6: Select Existing Shared Contact Folders

Contacts Upload Options Select checkboxes to include all entries, or click on "+" to expand and select folders within the item. Warning: After closing this clalog, you must restart Outlook for these changes to take effect.
Folder Contacts
OK Cancel

7. Select OK.