Startel User's Guide:

Secure Messaging Plus for Apple Devices

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Part Number: 91-1193-001

Revision Date: March 13, 2018

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Startel Secure Messaging Plus for Apple® Devices

This document describes how to use the **Startel Secure Messaging Plus (SM+)** App on a qualified Apple® iPhone®, iPad®, or iTouch®.

Topics in the document include:

WHAT IS STARTEL SECURE MESSAGING PLUS?

At the time of this writing, Secure Messaging Plus is supported for iPhones, iPads , and iTouch devices running Apple iOS **8.0** or higher.

Startel Secure Messaging Plus (SM+) is a high-security messaging system that allows subscribers to exchange sensitive information via messages that are encrypted in transit and at rest. Additional features, like *Expiring Messages, Password Requirements,* and *Remote Wipe (*for users who also use the SM+ Website), add extra security to ensure that private messages always remain private.

Secure messages can be sent or received using a qualified handheld device running the Startel Secure Messaging Plus App, or by logging into the Startel Secure Messaging Plus Website. (To exchange secure messages between handheld devices, both devices need to have the SM+ App installed.)

This document describes how to use the Secure Messaging Plus App installed on a qualified Apple˚ iPhone˚, iPad˚, or iTouch˚. If you are using the SM+ Website or an Android™ device, please request the document that describes SM+ Website or Android™ device usage.

For more information about key SM+ features and benefits, see ***"Key SM+ Features & Benefits"*** on page 6.

Please Note:

The instructions in this manual apply to the Secure Messaging App installed on an **Apple iPhone 5s**. Functions and screens may vary slightly if you are using a different device.

KEY SM+ FEATURES & BENEFITS

	FEATURE	BENEFIT
✓	**Encrypted Messaging**	Messages and attachments are safely encrypted on servers, devices, and in transit.
✓	**Group Messaging**	Users can define 'Groups' for group conversations with SM+ subscribers, and 'Distribution Lists' for broadcasting messages to multiple subscribers who can then respond to the sender only.
✓	**Message Forwarding**	Messages marked as *'Forwardable'* by the original sender can be forwarded to other SM+ subscribers.
✓	**Message Expiration**	Senders have the ability to determine when a sent SM+ message expires. Messages can expire when marked by the reader as *read* or *filed*, or in a selected number of days. Messages that do not have a defined expiration date will expire within a defined default period (not to exceed 30 days).
✓	**Password Protection**	Expiring passwords and forced lockouts help protect a user's data and account.
✓	**Multiple Device Support**	SM+ can be registered on up to 3 qualified handheld devices per subscriber. It can also be accessed via a Web browser.
✓	**Multiple Operating System (OS) Support**	SM+ is compatible with the latest versions of Android™ and iOS® (iPad®, iPhone®, iTouch®).
✓	**Support for Image and Audio Attachments**	SM+ messages can include image and audio attachments.
✓	**Remote Wipe Capability**	If an SM+ registered handheld device is lost or stolen, a Wipe command can be issued from the Web to remotely erase all SM+ App data stored on the device.
✓	**Message Status Tracking**	Subscribers can track when a message from their device was sent, viewed, read, and filed.

|		
✓	**Detailed Reporting**	Real-time reports on subscriber usage can be run (on the SM+ Website) by both subscribers and SM+ Channel Partner Administrators.
✓	**Full Audit Trails**	When SM+ is used in conjunction with a Startel CMC system, messages are fully tracked and archived.
✓	**Accessibility**	SM+ messaging is easily accessible using a Web browser, Apple® handheld, or Android™ handheld running the SM+ App.
✓	**Privacy Policy**	Startel does not disclose, sell, or distribute users' personal information to any third party.

Downloading & Installing the SM+ App

Before you can exchange Secure Messaging Plus messages using an Apple iPad, iPhone, or iTouch, you will need to download the Secure Messaging App from the Apple iTunes Store.

Once the App has been downloaded and installed on the device, you will be able to use your Secure Messaging Plus **User name** and **Password** to Login and use the application. If you have not been provided with a User name and Password, please contact your SM+ Channel Partner Administrator.
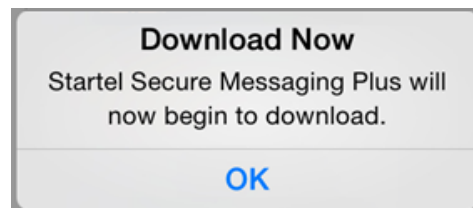
These instructions apply to a typical Install procedure. Your Install procedure may vary depending on your device, and device settings.

Follow these steps to install the SM+ App on an Apple device:

1 Go to the Apple iTunes Store and search for **Startel**.

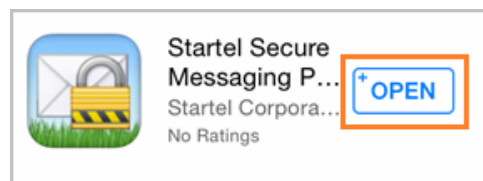**2** Find the Startel Secure Messaging Plus App.
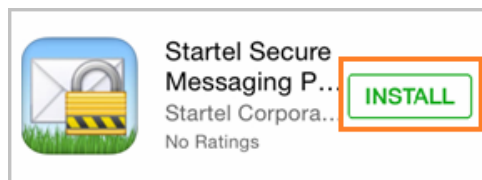
3 Tap **Install**.

4 When prompted to read and accept Terms and Conditions, tap **Agree** to accept and proceed.

A message like the following is displayed:
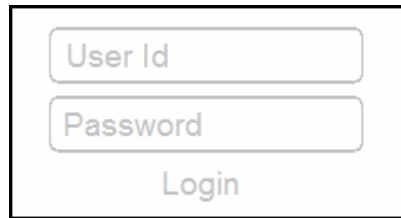

5 Tap **OK**.

When the download is complete, you will see the following:

6 Tap **Open**.

7 You are prompted to indicate if you want to receive message notifications (Push notifications) when the SM+ App is closed. Select **OK**.
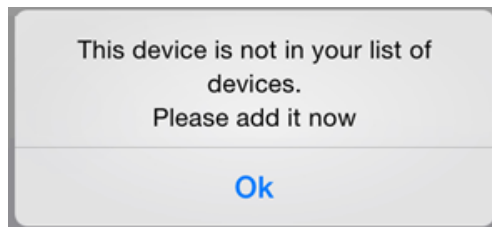
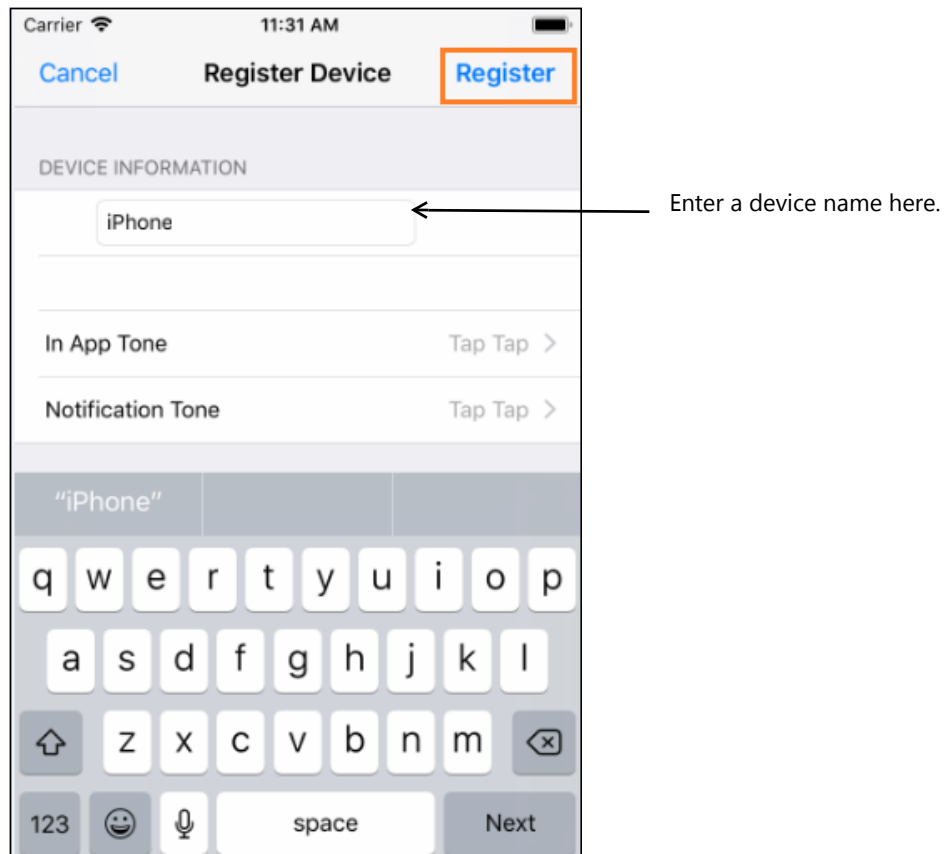**8** A **Login** prompt is displayed.

> User Id
>
> Password
>
> Login

9 To log in to the application, enter your Secure Messaging Plus User name and Password into the **User Id** and **Password** fields. (Only the password is case sensitive.)

You will see a message like the following:

> This device is not in your list of devices.
> Please add it now
>
> **Ok**

10 Tap **Ok**.

A screen for entering device information is displayed:

Carrier 🔋 11:31 AM

Cancel **Register Device** Register

DEVICE INFORMATION

iPhone ⟵ Enter a device name here.

In App Tone Tap Tap >

Notification Tone Tap Tap >

"iPhone"

q w e r t y u i o p

a s d f g h j k l

⇧ z x c v b n m ⌫

123 ☺ 🎤 space Next

11 In the field under the **Device Information** heading, enter a name for the device. This is for your reference only, and will only be seen when viewing your registered device(s) through the SM+ Website or in the audit trails.

12 Select an **In App Tone** notification from the available options. This notification plays when the App is *open* and a new message arrives.

13 Select a **Notification Tone** from the available options. This notification tone plays when the app is *closed* and a new message arrives.

14 Tap **Register** at the top right of the screen.

When the device registers correctly, the Secure Messaging Plus **Conversations** screen appears. From here, you can start a conversation with any other registered SM+ subscriber, or with your contact center if they are using a Startel CMC system integrated with Startel Secure Messaging Plus.

After you begin exchanging messages with other SM+ users, active conversations are listed in the Conversations screen.:
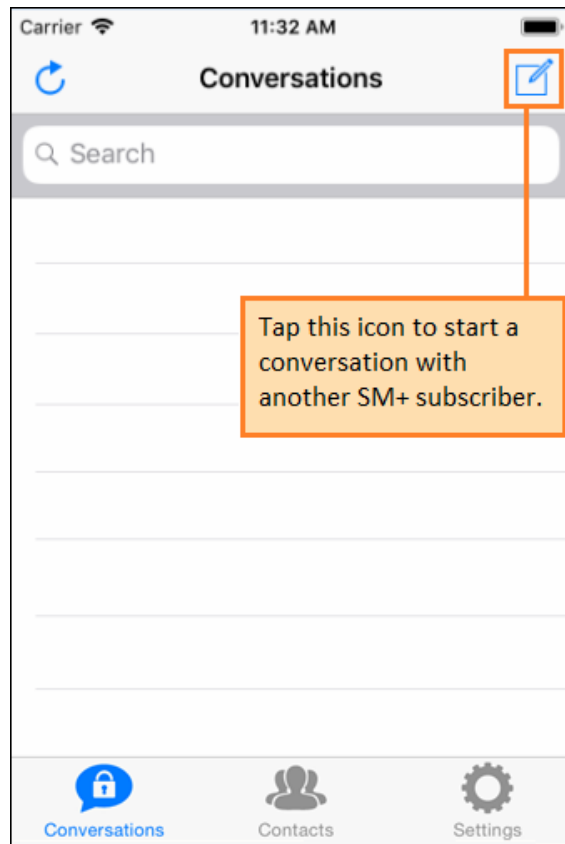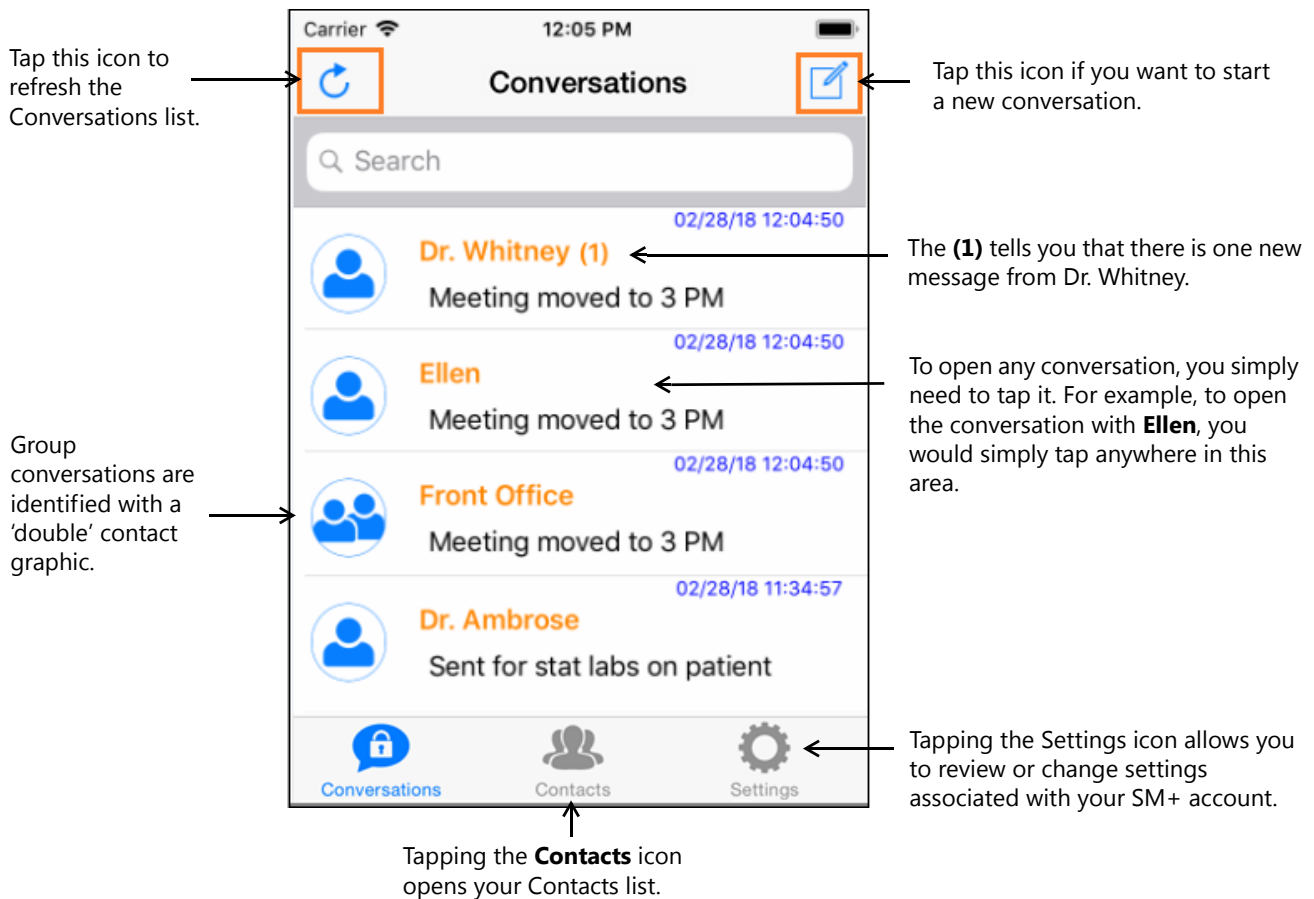

15 For more information, see **"Secure Messaging Plus Conversations"** on .

SECURE MESSAGING PLUS CONVERSATIONS

Any SM+ subscriber who sends you a message, or to whom you send a message, is automatically added to your Contacts list. See page 16 for more on SM+ Contacts.

When you open the Secure Messaging Plus (SM+) App on an Apple handheld device, a **Conversations** screen lists active conversations, showing a preview of the most recent message in each one. (This message may be one you sent, or one you received.) The conversations are represented by the **name** of the Contact associated with the conversation.

Conversations that contain **new** (unviewed) messages sent by the contact are at the top of the list. A number in parentheses is shown to indicate how many messages from a contact are new. For example, a **(1)** will be shown if a conversation has one new message from a listed Contact.

Tap this icon to refresh the Conversations list.

Tap this icon if you want to start a new conversation.

The **(1)** tells you that there is one new message from Dr. Whitney.

To open any conversation, you simply need to tap it. For example, to open the conversation with **Ellen**, you would simply tap anywhere in this area.

Group conversations are identified with a 'double' contact graphic.

Tapping the Settings icon allows you to review or change settings associated with your SM+ account.

Tapping the **Contacts** icon opens your Contacts list.

See the following topics for more information:

◆ **Starting a New Conversation** — Page 12

◆ **Opening/Continuing an Existing Conversation** — Page 13

◆ **Forwarding a Message** — Page 15

◆ **Secure Messaging Plus Contacts** — Page 16

◆ **Secure Messaging Plus Settings** — Page 19

Starting a New Conversation

Follow these steps to start a new conversation from the Conversations screen:

1 Log in to the SM+ App.

2 When the Conversation screen is displayed, tap ✎.

> A New Message screen opens:
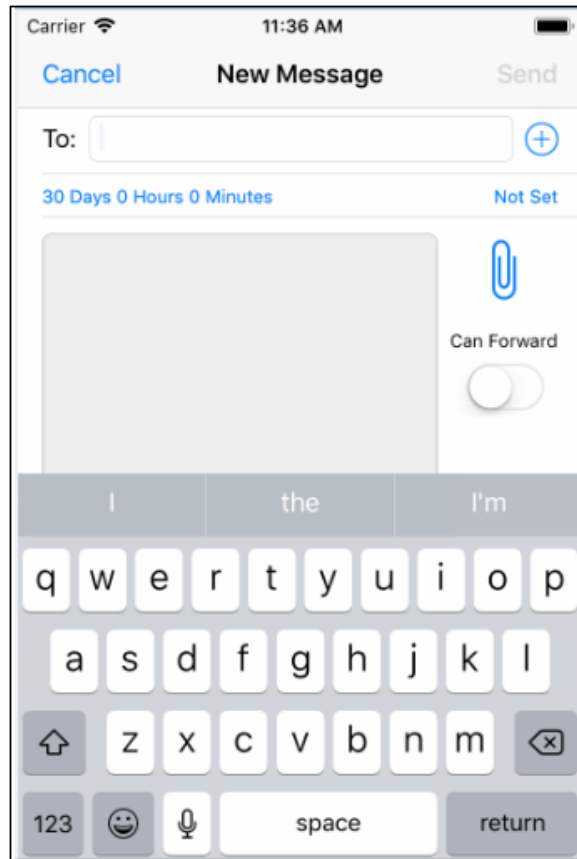
Setting a Message Expiration

Expiration settings control when the message will expire if the message is not manually expired from the SM+ website or handheld device.

If you want to set specific Expiration settings for a message, tap the default Expiration setting shown in blue. (For example, **30 Days 0 Hours 0 Minutes**). Then indicate your preference for the message. For an explanation of the Expiration options, see page 22.

Setting the 'Can Forward' Option

The **Can Forward** option controls whether or not the message you are sending will be 'forwardable.' The option will be on or off by default, but you can change the setting when sending a message from this view. Simply slide the setting to the right to enable forwarding, or to the left to disable forwarding. When Forwarding is turned on, the feature appears green. See page 15 for more on forwarding.

To send a message to more than one user, type in multiple User names separated by semicolons, or select multiple contacts from the Contacts list.

3 In the **To:** field, enter the SM+ **User name** of the SM+ subscriber to whom you want to send the message. (Or tap ⊕ to select from your Contacts list.) If you enter a valid SM+ User Name that is not already in your SM+ Contacts list, the subscriber is added to the Contacts list.

4 Set the message Expiration and specify whether or not the receiver of the message should be able to forward the message. (See above/right for instructions.) If you make no changes, default settings are used.

5 Type up to 1024 characters in the message field.

6 To attach a recording or image file, tap 📎, then select the desired file.

7 When you're ready to send the message, tap **Send**.

Opening/Continuing an Existing Conversation

Follow these steps from the Conversation screen to open or continue an existing conversation:

1 Tap the conversation that you want to see displayed.

Left-justified messages on a **gray** background are messages that were **SENT TO YOU**.
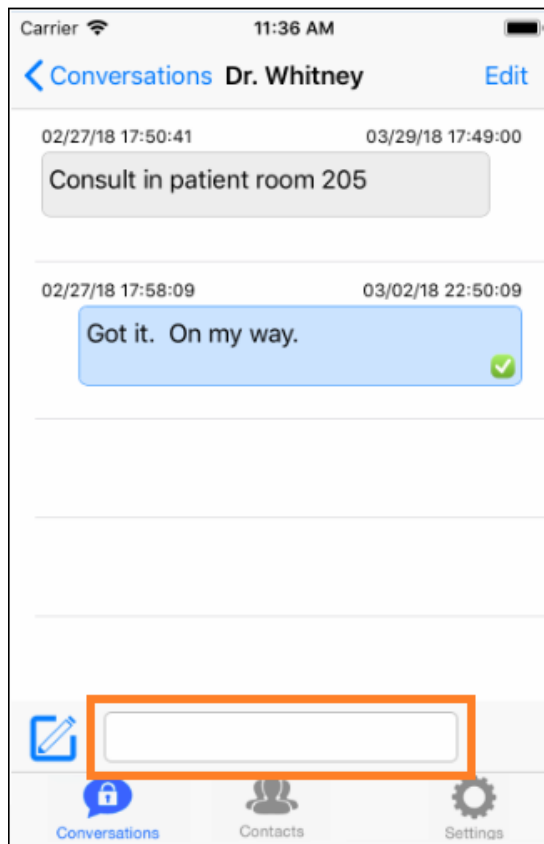
To mark a received message as 'read,' expire a message, delete a message, or file a message, tap the message, then tap **Edit**. See page 14 for more information.

Right-justified messages on a **blue** background are messages that **YOU HAVE SENT.**

The ✅ icon indicates that the subscriber has viewed the message.

New messages are shown in **boldfaced blue** text.

2 To send a new message, type up to 1024 characters into the message field at the bottom of the conversation (it's highlighted above).

3 To apply special options to the message—for example, if you want to set a special Message Expiration, allow forwarding, or add an attachment to the message—tap 🖊 .

4 When you're ready to send the message, tap **Send**.

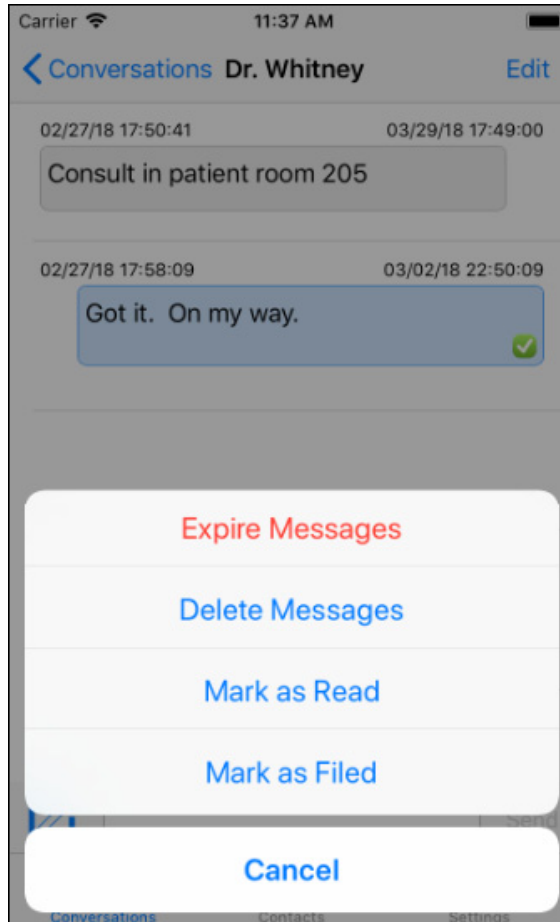**Important Note to Users Associated with a Call Center**

If you are **replying** to a message from your call center, you should select (tap) the message to which you're replying. When you do this, the **Send** feature changes to **Reply**. Using **Reply** instead of **Send** establishes a connection between the two messages in the software/database used by the call center.

Applying "Edit" Options to a Message or Messages

If you tap **Edit** in the upper-right corner of a message conversation, a list of options opens at the bottom of the screen.

To use an option, you simply tap the option, then tap the message or messages to which you want to apply the option.

When you're finished, tap **Done**. (**Edit** will have changed to **Done**.)

When Edit Options are displayed:

- Tapping **Expire Messages** removes the selected message(s) from all handheld devices (sender's and receiver's), from the SM+ Website, and from the SM+ database. (Be cautious. This cannot be undone.)

- Tapping **Delete Messages** removes the selected message(s) from this device only. (A *Resynchronize* will restore non-expired deleted messages. See page 23 for details.)

- Tapping **Mark as Read** allows the message sender to see that you have read the selected message(s).

- Tapping **Mark as Filed** files the selected message(s), communicating to the contact center that the message is no longer pending.

- Tap **Cancel** to cancel.

Please Note:

The **Mark as Filed** feature applies to subscribers who receive messages from a contact center.

Forwarding a Message

If a message has been designated as *'forwardable'* by the sender, tapping and holding the message will display a **Forward** option. Selecting this option copies the selected message (prefixed with FWD:) and prompts you to enter the person to whom you wish to forward the message.

Follow these steps to forward a message:

1 Tap and hold the message you want to forward.

2 Tap **Forward** on the options list that displays. (If Forward is not on the list, the message cannot be forwarded.)

A new Message window opens, with the text of the message (prefixed with FWD:) and attachments, if applicable.

3 At the **To:** prompt, enter the SM+ User to whom you want to forward the message.
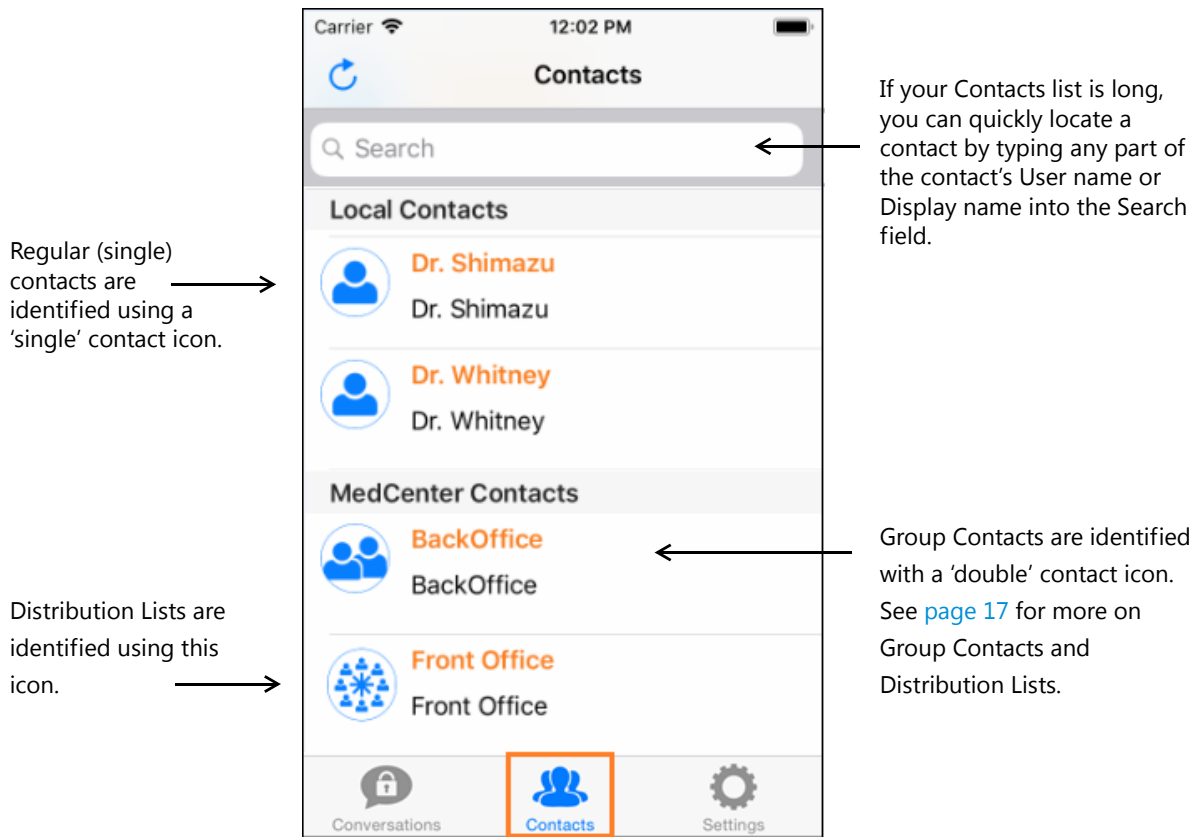
4 When you're ready to send the message, tap **Send**.

NOTE: The original sender's Expiration date will apply to the forwarded message.

Secure Messaging Plus Contacts

Any SM+ subscriber who sends you a message, or to whom you send a message, is automatically added to your Secure Messaging Plus Contacts list.

To see your Contacts list, you simply need to tap the icon.

If your Contacts list is long, you can quickly locate a contact by typing any part of the contact's User name or Display name into the Search field.

Regular (single) contacts are identified using a 'single' contact icon.

Group Contacts are identified with a 'double' contact icon. See page 17 for more on Group Contacts and Distribution Lists.

Distribution Lists are identified using this icon.

To display a set of options for any contact, simply tap the contact's name.

The screen on the following page shows the options associated with the **Back Office** contact shown in this sample screen.
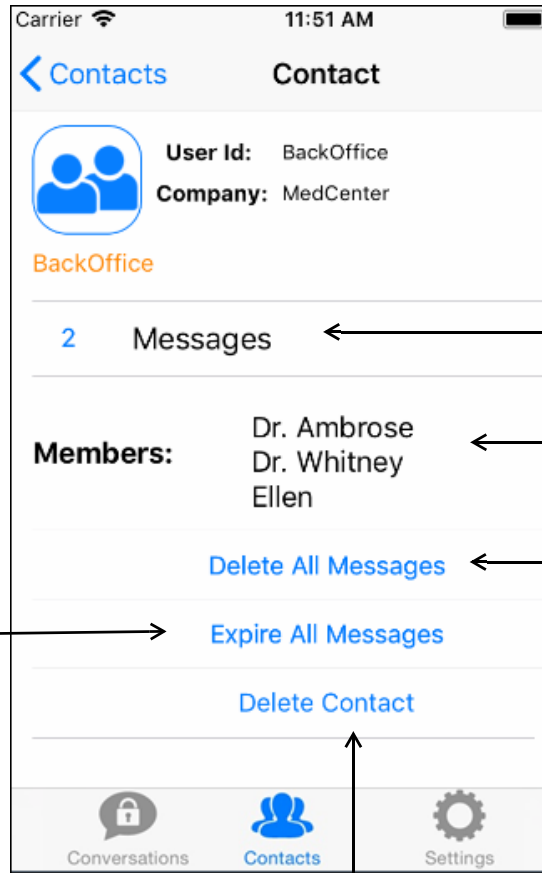
In a Contact screen:

Tapping here redisplays the Contacts list.

Tapping this icon lets you select a photo for the contact.

Tapping the orange Display Name lets you change the *Display Name* for the contact.

The number **2** tells you there are 2 messages associated with this contact. Tapping the **2** takes you to the Conversation screen for the contact.

If a contact is a 'Group Contact' or 'Distribution List,' a **Member** section lists each member of the group/list. This section is scrollable.

Tapping **Delete All Messages** deletes all messages associated with this contact from the device. Messages are deleted *from this device only*.

Note: Messages that have not expired will reappear upon "resynchronization." See page 23 for details on resynchronization.

Tapping **Expire All Messages** removes ALL messages associated with this contact—from *this device*, from the *contact's device*, from the *SM+ Website*, and from the *SM+ database*.

Tapping **Delete Contact** deletes the contact *from this device only*. (Deleted contacts will reappear upon "resynchronization," or when contacts resynchronize.)
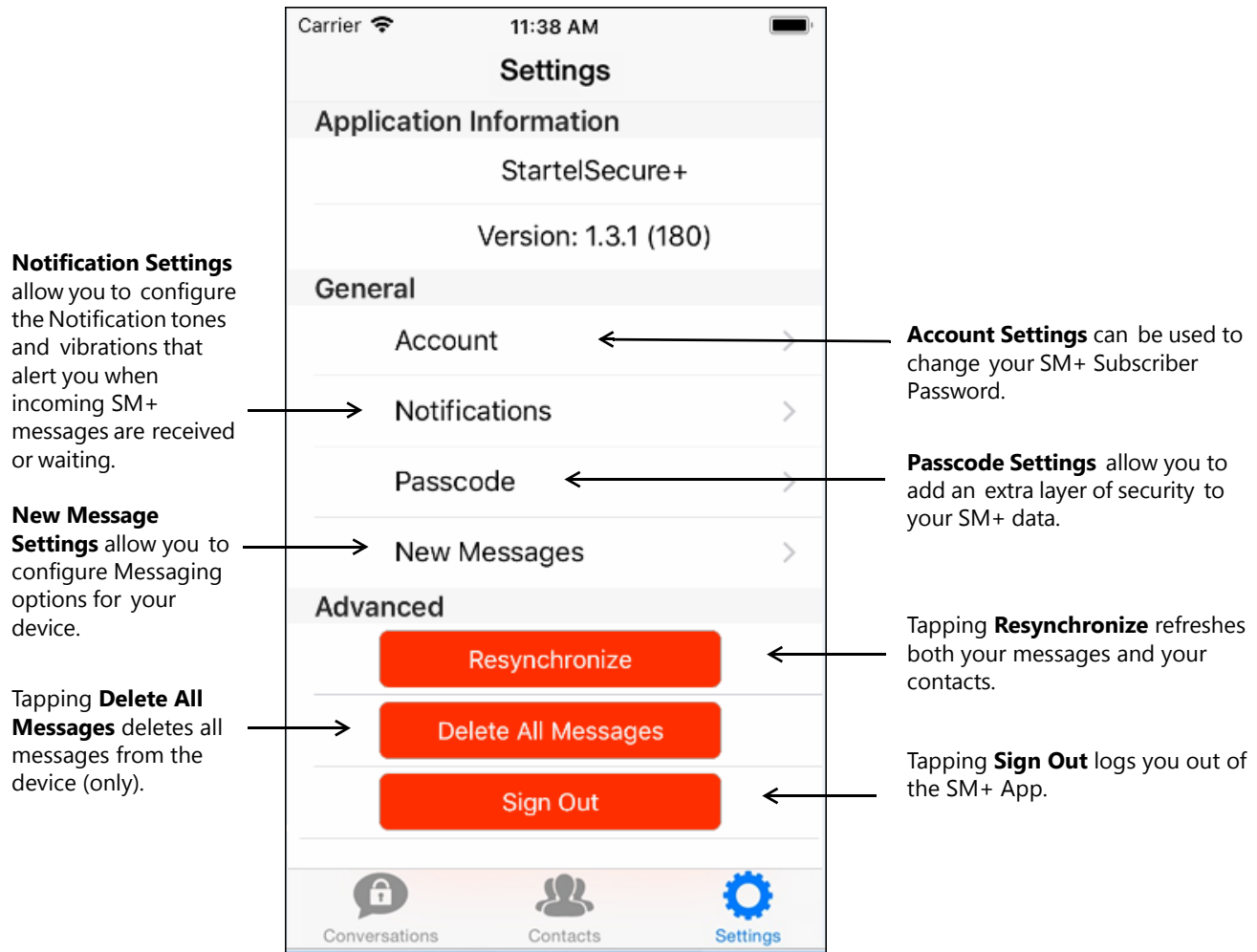
Group Contacts vs Distribution Lists

Secure Messaging Plus supports two types of Group Messaging. Both require you to configure a 'Group Contact' on the Secure Messaging Plus website, but one is enabled as a 'Distribution List.'

- When a new message is sent to a **Distribution List**, it starts an **individual conversation with each member of the list**. When a member of the group replies to the message, the reply is sent only to the original sender of the message.

- When a new message is sent to a **Group Contact** (that's **not** enabled as a Distribution List), it starts a **group conversation**. When a member of the group replies to the message, the reply goes out to all of the members of the group.

Secure Messaging Plus Settings

Tapping the SM+ [Settings] icon opens a screen from which you can access and change a number of different Secure Messaging Plus settings.
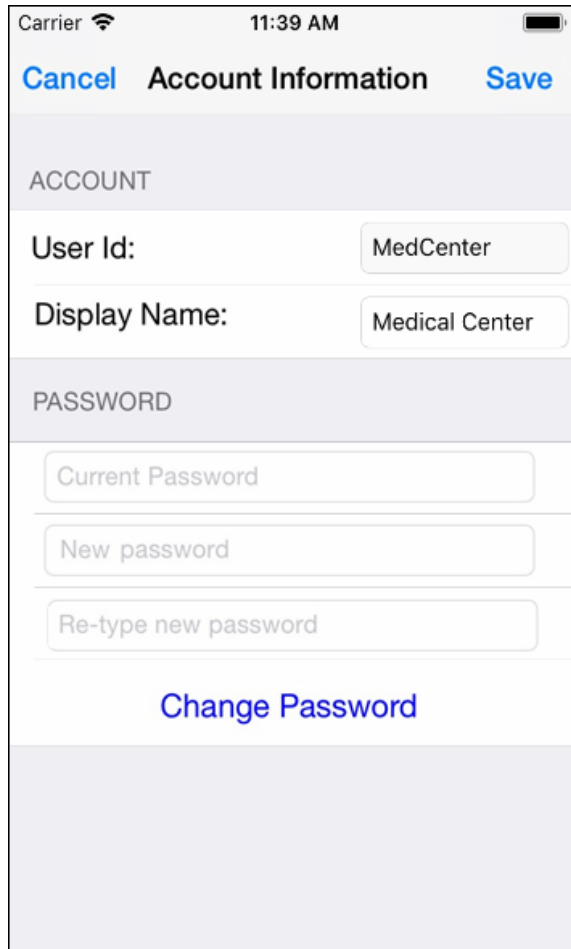
Notification Settings allow you to configure the Notification tones and vibrations that alert you when incoming SM+ messages are received or waiting.

New Message Settings allow you to configure Messaging options for your device.

Tapping **Delete All Messages** deletes all messages from the device (only).

Account Settings can be used to change your SM+ Subscriber Password.

Passcode Settings allow you to add an extra layer of security to your SM+ data.

Tapping **Resynchronize** refreshes both your messages and your contacts.

Tapping **Sign Out** logs you out of the SM+ App.

See the following topics for more information:

- ◆ **Changing Account Settings** —

- ◆ **Changing Notifications Settings** —

- ◆ **Changing Passcode Settings** —

- ◆ **Changing New Messages Settings** —

Changing Account Settings

Tapping **Account** in the SM+ Settings screen shown on opens a screen from which you can change your SM+ Display Name and SM+ login Password. (You cannot change the User Id (User name). The User Id shown in this screen is display-only.)

You **cannot** change the User Id in this screen. This field is display only.

- To change the **Display Name**, replace the current name, then tap **Save**.

- To change the Password, enter the current password in the **Current Password** field, type a new password in the set of fields below, and then tap **Change Password**.

NOTE: A "strong" password containing letters, numbers, a special character, and upper and lower-case letters is recommended, and can be set as a requirement in the user's profile.

Changing Notifications Settings

Tapping **Notifications Settings** in the SM+ Settings screen (shown on page 18) displays a screen where SM+ Notifications settings can be viewed or changed.
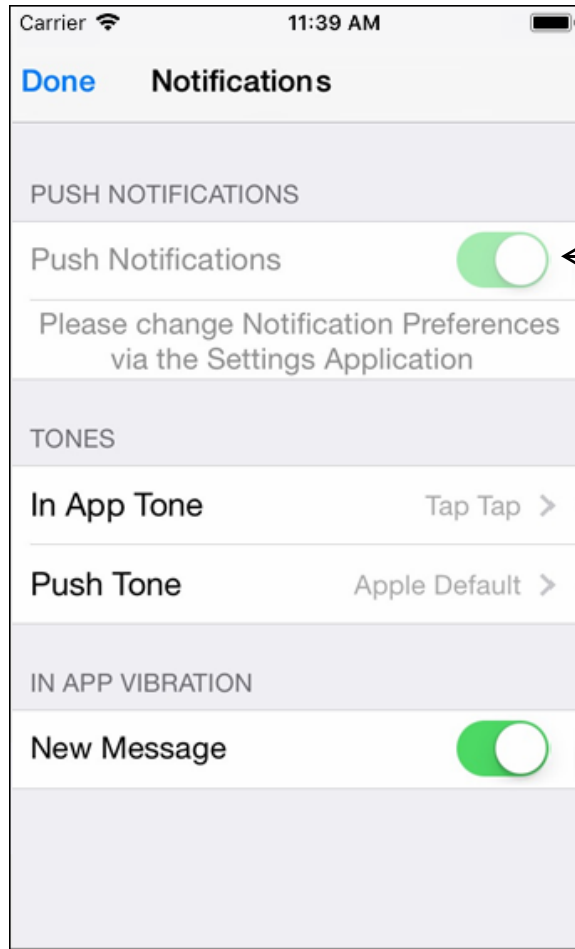
If **Push Notifications** are enabled for this application, you will see the "slide button" in this position.

To enable this feature and configure Push Notification preferences, access your device's **Settings** application.

Under the TONES heading:

• Tap **In App Tone** to customize the notification tone that will occur when you receive a new SM+ message while the SM+ App is open.

• Tap **Push Tone** to select the notification tone that will occur if a message is received when the SM+ App is minimized or closed.

Under the IN APP VIBRATION heading:

• Use the **New Message** "slide button" to choose a vibration in addition to a tone as the "In App" notification.

Changing Passcode Settings

Tapping **Passcode Settings** in the SM+ Settings screen (shown on page 18) displays optional features that you can use to add extra layers of security to the SM+ data on your device.
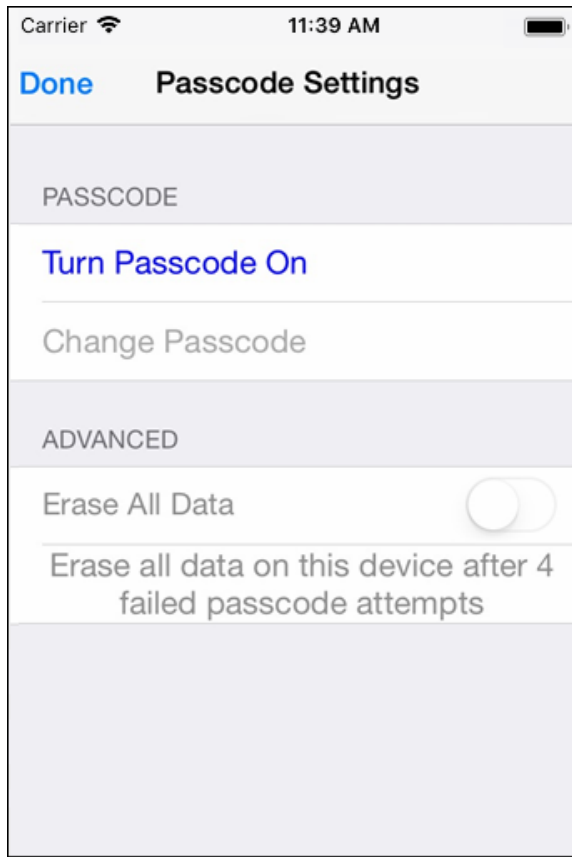

In this screen:

- Tap **Turn Passcode On** to enable Passcode Protection. When Passcode Protection is active, you will be required to enter a passcode **each time** you access the Secure Messaging Plus App while already logged in.

  Note: When you check this option, you are prompted to specify the passcode. This passcode is not recoverable if it's forgotten, so please be sure to remember it.

- Tap **Change Passcode** to change the current passcode.

- Use the **Erase All Data** "slide button" to enable a feature that will **erase all messages** from your handheld and close the SM+ App in the event that four failed attempts are made to enter the passcode.

  Note: Messages deleted from the device will still be accessible from the SM+ Website. Also, unexpired messages will be restored to the device upon successful login to the SM+ App.

Changing New Messages Settings

Tapping **New Messages** in the SM+ Settings screen (shown on opens a screen where you can view and change the default Expiration settings that will be used for your SM+ Subscriber account. You can also configure the default setting that determines whether messages you send can be forwarded to other SM+ subscribers.
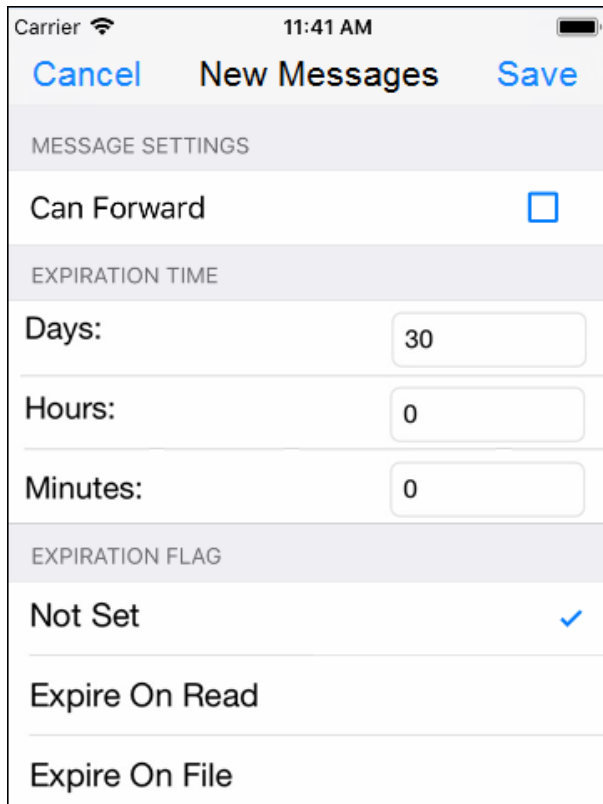
The default status of these settings depends on the way in which your SM+ User profile was initially configured by the SM+ administrator who created it.

Allowing SM+ Message Forwarding

To allow, by default, the forwarding of your SM+ messages to other SM+ subscribers, check the **Can Forward** checkbox.

Note: When sending a message, you will have the option of changing this setting for the individual message.

Configuring Expiration Settings

Expiration Settings control when a message sent by the subscriber will expire if the message is not manually expired from the SM+ website or handheld device. When a message is expired, it is removed from all handheld devices (both sender's and receiver's), from the SM+ Website, and from the SM+ database.

- Under the **Expiration Time** heading, specify a default expiration time for sent messages that are not expired by other means (*on read*, *on file*, or manually). For example, 10 Days.

- Under the **Expiration Flag** heading:

  - Tap **Expire On read** if you want SM+ messages sent by the subscriber to be expired when they are marked as *Read* by the message receiver.

  - Tap **Expire On File** if, by default, you want SM+ messages that you send to be expired when they're filed by the message receiver.

  - **Not Set** is selected automatically if neither of the other options is selected.

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