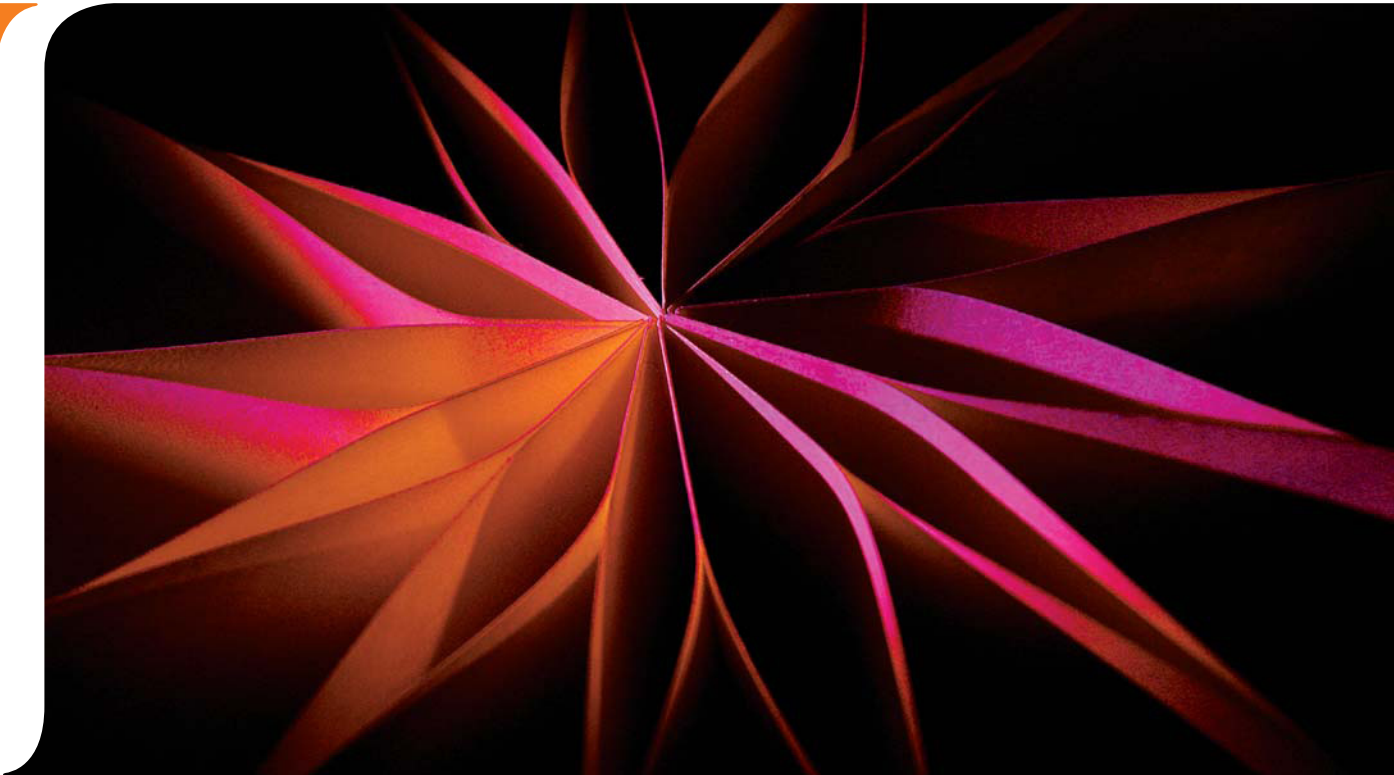


ShoreTel 12

ShoreTel Conferencing User Guide



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ShoreTel Conferencing Overview

ShoreTel Conferencing provides an easy-to-use tool to conference calls, share your desktop or applications with others, make presentations, and record conferences. Conferences can be web and audio, web only, or audio only conferences. ShoreTel Web Conferencing runs in a standard Web browser and does not require installation of any special software on your computer if you are a ShoreTel Communicator user.

ShoreTel Conferencing can:

- Create new conferences and edit and delete existing conferences.
- Lead a conference and give presentation rights.
- Browse the list of conferences that were created by the owner.
- Manage the library content for conferences.
- View details about host created conferences.
- View and play recordings.

Conference participants can:

- Easily access a conference by following the directions on the conference invite.
- Access and view listing of available conferences.
- View and play available recordings.

ShoreTel Web Conferencing is accessible through 3 User Interfaces (UI)

- **Conference Viewer:** Used by the conference host and participants to see and share applications and presentations.
- **Conference Web Portal:** Used primarily by hosts to schedule, start, delete conferences and access their recordings.
- **Conference Administration Site:** Allows an Administrator to configure web site parameters, establish default conference parameters, and also view and generate web conference reports.

Note: Web Conferencing may also be accessed from Outlook and ShoreTel Communicator for Windows.

Web Conferencing provides the following features:

Conference Management	Audio Conferencing	Web Conferencing
<ul style="list-style-type: none">• Scheduled, Instant, and Reservationless Conference	<ul style="list-style-type: none">• HD Audio	<ul style="list-style-type: none">• Zero install for participants
<ul style="list-style-type: none">• Customizable host and participant access codes	<ul style="list-style-type: none">• Telephone User Interface (TUI) with wide number of commands	<ul style="list-style-type: none">• Zero install for hosts using ShoreTel Communicator
<ul style="list-style-type: none">• Audio and Web Conference Recordings/Playback	<ul style="list-style-type: none">• Call Participant	<ul style="list-style-type: none">• Application and desktop sharing
<ul style="list-style-type: none">• Secure Conferencing: Encrypted Web Conferences (HTTPS)	<ul style="list-style-type: none">• Integrated Conference button on ShoreTel IP phone• Resilient conferencing	<ul style="list-style-type: none">• Application and desktop sharing recording/playback

Conference Management	Audio Conferencing	Web Conferencing
<ul style="list-style-type: none"> Encrypted Audio Conferences (SRTP) 7 Digit access Conference Locking Requiring a password to join a web conference Outlook scheduling 		<ul style="list-style-type: none"> Shared and Private library Whiteboard File transfer Conference Chat Support for Microsoft PowerPoint and any Flash document Resilient Conferencing

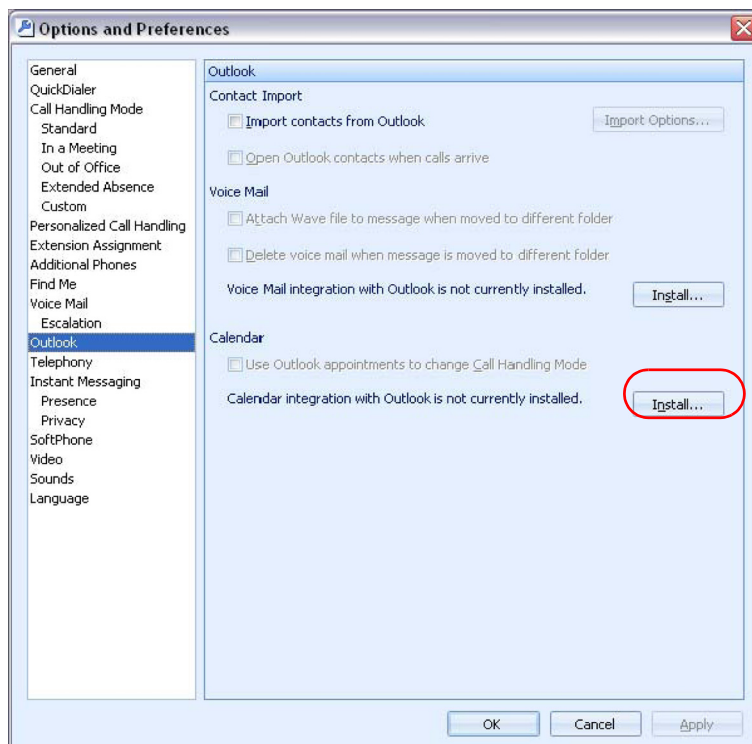
Microsoft Outlook Integration

ShoreTel Conferencing integrates into Microsoft Outlook 2007, 2010 Windows to facilitate simple and rapid scheduling of conferences.

Integrating with Microsoft Outlook Calendar

To integrate with Outlook Calendar for ShoreTel Conferencing:

- Step 1 Go to ShoreTel Communicator and click **Options and Preferences**.
- Step 2 From the drop down menu, select **Outlook**.
- Step 3 Click **Install** under the Calendar heading.



Note: Previous ShoreTel Converged Conferencing users must first uninstall Outlook Calendar integration and then reinstall it prior to integrating with ShoreTel Conferencing.

To uninstall integration with Outlook Calendar for ShoreTel Converged Conferencing:

- Step 1 Go to ShoreTel Communicator and click **Options and Preferences**.
- Step 2 From the drop down menu select **Outlook**.
- Step 3 Click **Uninstall** under the Calendar heading.

Creating Conferences in ShoreTel Communicator

ShoreTel Communicator users can instant conferences using ShoreTel Communicator. The host and participants must be ShoreTel Communicator users.

Creating an Instant Conference

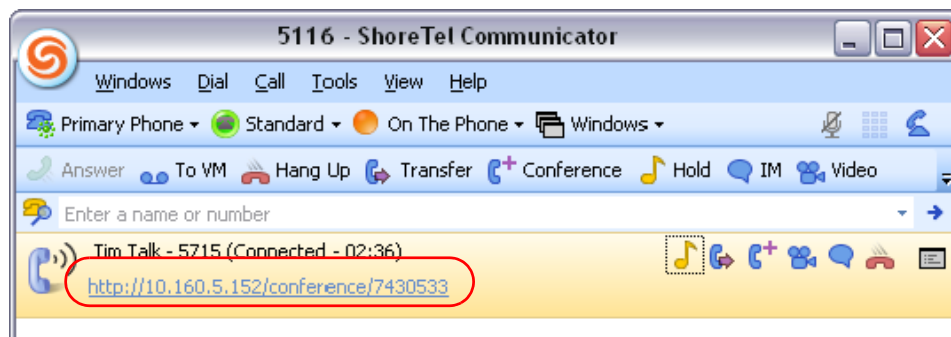
An Instant Conference is launched from ShoreTel Communicator with others who are also using ShoreTel Communicator. In this example, Lucy and Tim are both using ShoreTel Communicator and Lucy is configured to use ShoreTel Conferencing.

Instant Conferencing is set up in the following manner:

- Step 1 Lucy calls Tim. During the call, Lucy initiates an instant Conference by clicking the **Start Instant Conference** icon in the Communicator call cell.



- Step 2 The Conference Viewer launches automatically for Lucy as the host.



Step 3 The Communicator call cell for participants displays either a weblink or a prompt depending on the user's Communicator options. This is used to launch the Web Conference Viewer

Note: The Conference Viewer may also launch automatically depending on configuration. Tim can also click the link to join the web conference.

Lucy can conference in more ShoreTel Communicator users. Each of their call cells automatically displays the weblink or prompt, depending on the user's Communicator options.

Scheduling Conferences through Microsoft Outlook Calendar

ShoreTel Communicator users can schedule conferences using Outlook calendar.

There are two types of conferences that can be scheduled in Outlook:

- One time appointments that occur on a single date and time (e.g. September 14th, 2-4 PM).
- Recurring appointments that occur over a period of time (e.g. Every Thursday from 2-4PM until December 31st).

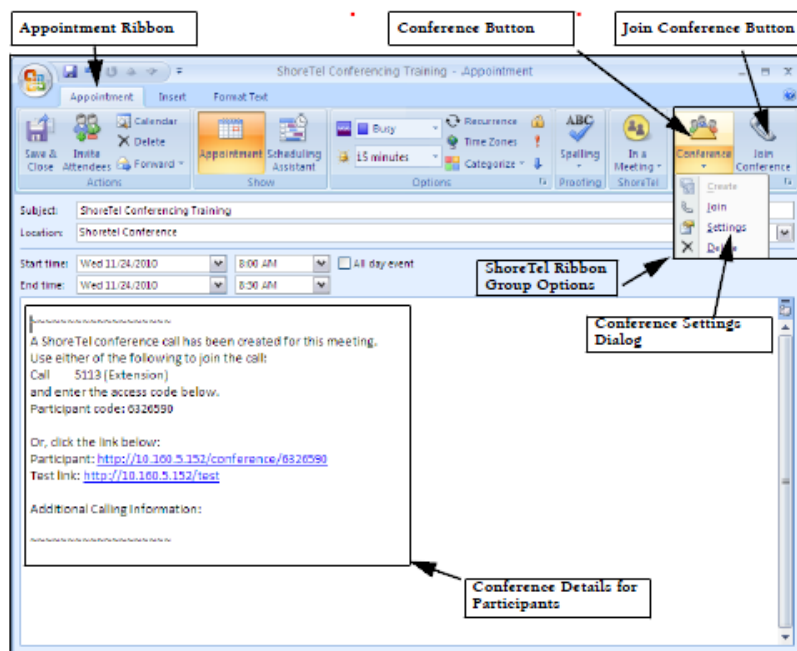
Note: If a conference is created through Outlook and its duration is greater than 4 hours, it will be listed under the Conference Web Portal with a duration of 4 hours.

To schedule a one time or recurring appointment in Outlook:

Step 1 Access Outlook and create an appointment, providing the required appointment details such as date, time, recurrence, etc.

Step 2 Add a conference by either:

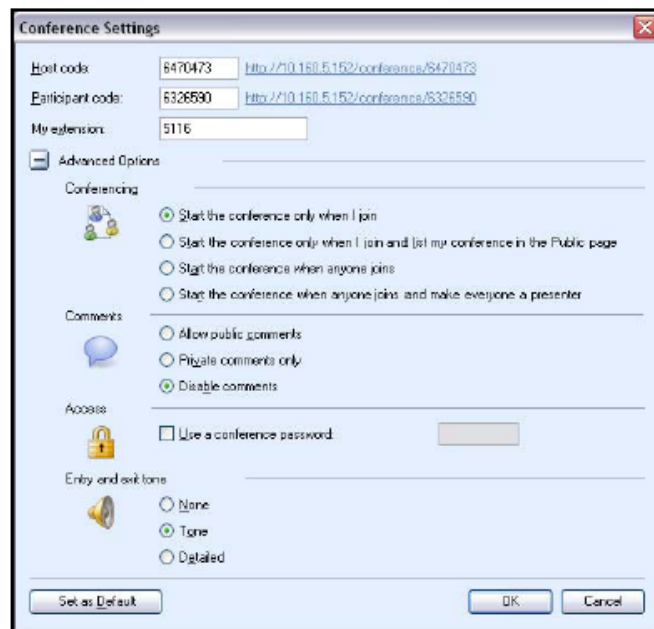
- Pressing the top half of the **Conference** button to automatically create a conference and add the details to the body of the appointment.
- Alternatively, pressing the bottom half of the **Conference** button and selecting **Create** from the menu to create a conference and add details to the body of the appointment.



Step 3 The user can join the conference from the appointment window by clicking **Join Conference**.

Note: Outlook integration with ShoreTel Conferencing is only supported for a user's direct activity from their calendar. Scheduling meetings through delegated or shared access to another user's calendar is not supported. Attempts to schedule a meeting under these conditions may produce unexpected results, including host/participant codes being blank and an inability to delete or edit the conference.

Note: The advanced settings are available by clicking on the dialog launcher in the corner of the Conference Ribbon or by selecting **Settings** from the **Conference** button



Conference Settings and advanced options include:

Host Code: Automatically provided or can be customized

Participant Code: Automatically provided or can be customized

Advanced Options:

Conferencing: Determines when the conference is started

Comments: Determines whether comments are allowed by participants and what type of comments are allowed

Access: Determines whether a participant password is needed to access the conference. Note: The conference password may only consist of standard ASCII characters. Non-ASCII characters are not supported.

Entry and exit tone: Determines whether a tone is played when a participant enters or leaves the conference

Additional Limitations

If an Outlook meeting is created that contains a ShoreTel conference, some limitations apply:

- When a change is made in Outlook to the properties of a recurring meeting, the only item the user can change is the subject of the meeting, not date or time, as it is considered a reservationless conference. However, Outlook prompts the user "This is a recurring appointment, do you want to open only this occurrence or the series?" A change of subject made to a single occurrence (time, day of week, etc) will still be applied to the entire series in the Conference Web Portal, even though Outlook will only reflect the change to the single occurrence.
- When a recurring meeting is scheduled through Outlook, it appears in the Conference Web Portal under the Reservationless conference list. If a recurring meeting is later changed into a scheduled meeting, the system will not move the meeting under the Scheduled Conference list, even though the meeting type has changed.

For the above two limitations, if a user does not wish to change the entire series or have their meeting appear under the incorrect meeting list, they must delete and then recreate their meetings appropriately with the correct details or meeting type.

ShoreTel Conference Web Portal

Accessing the ShoreTel Conference Web Portal

To sign into ShoreTel Conferencing:

Step 1 Open a browser window.

Step 2 In the Address field, type the URL for the ShoreTel Conferencing application provided by your system administrator.

The main Conference window appears:

Welcome, Bill Smith | [Sign Out](#) | [Help](#)

Access Code:

Public | **My Conferences** | **Personal Library** | **My Profile**

[Conferences](#) | [Recordings](#) | [System Test](#) | [Speed Test](#) | [Download](#)

Show:

Name	Date		
Product Update Hosted by: Bill Smith Update and progress discussion on product implementation.	2010-09-10 9:00 pm 01:00	<input type="button" value="Info"/>	<input type="button" value="Join"/>

1 1-1 Total: 1

From the main Conference Window, you can:

- Join a conference by entering the conference access code or clicking on the **Join** button.
- See a list of Current, In-Progress, or All conferences designated as public.

- Obtain information or add a comment to a public conference by clicking on the **Info** icon. You can also join a conference.

You can also:

- Test your computer to ensure that you have the correct OS and browser requirements are met.
- View a list of recordings that have been marked as public.
- Test computer download speed from the hosting server.
- Download Presenter and/or SDA software if required.

My Conferences Tab

The My Conferences > Conferences tab is used to:

- Add new conferences.
- Delete existing conferences. (Except for Outlook created conferences)
- Edit existing conferences.
- Invite participants to conferences.

To access the My Conferences tab:

Step 1 Enter the user ID and password that your system administrator has provided.

Sign In | Help

Access Code:

Enter your ShoreTel User ID and Password

User ID:

Password:

Stay signed in

Step 2 Click **Sign In**.

Note: By clicking the **Stay signed in** check box, the system allows you to access the My Conferences, Personal Library, and My Profile tabs without logging in every time you access ShoreTel Conference Web Portal.



After logging in, you are presented with the **My Conferences** window.



The My Conferences tab contains the following options:



- **Conferences:** View/schedule and invite participants to your conferences. Allows choosing other options, such as time/date, participant login requirements, access codes, etc. Also includes a link to download Presenter Software, which is required for certain Presenter functions, such as Desktop sharing.

There are two conference lists:

- **Today's Conferences:** Shows conferences scheduled for today. Reservationless conferences appear in the Today's Conferences list. They appear at the top of the list.
- **Conferences:** Shows conferences scheduled for any other day. Conferences are sorted by the newest conference at the top. Actions on conferences include:
 - Start conferences
 - End conference
 - Join conference
 - End recording

Conferences and recordings have descriptive icons associated with them:

Public Conference:

Participants can access ShoreTel Conferencing URL and join a conference.

Has audio:

The recording includes audio for the conference.

Password Required

A password is required for participants to access the conference.

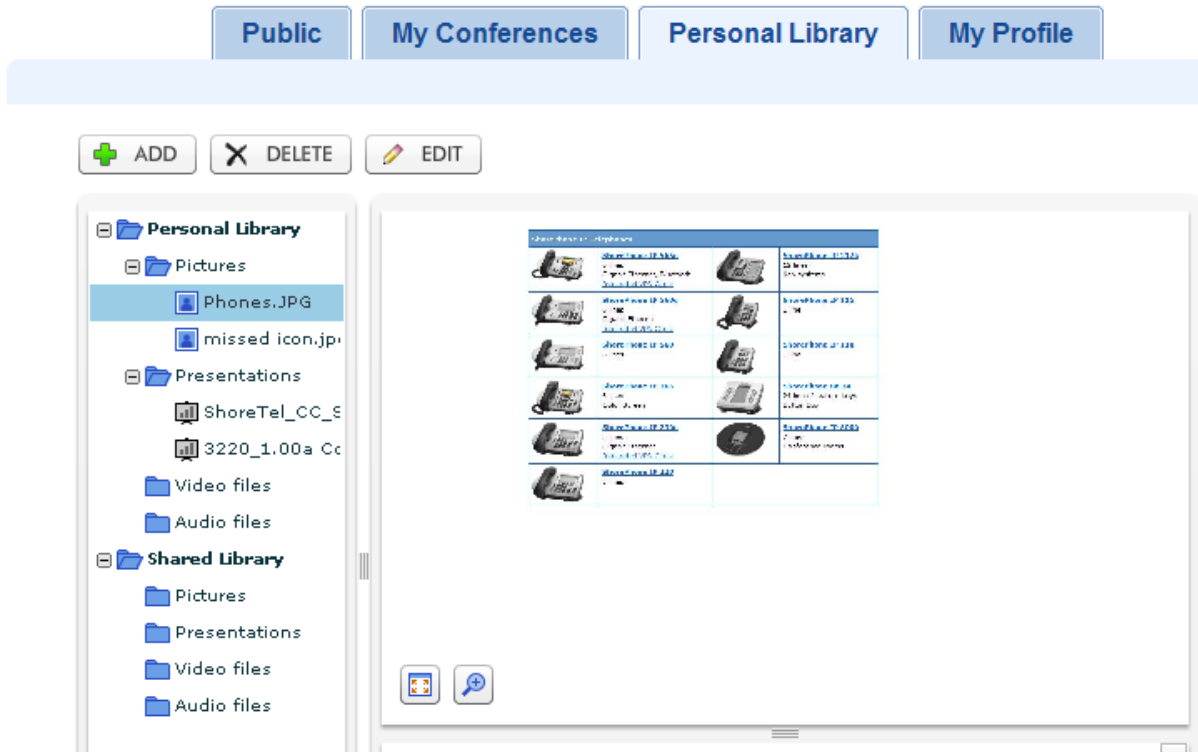
Note: The conference password may only consist of standard ASCII characters. Non-ASCII characters are not supported.

The Date column will show the date and time of the conference, if not yet started, or 'In Progress' if the conference has started.

- **Recordings:** Play and invite others to play recordings made by the user. One can also organize and delete recordings.
- **Conference Viewer:** Provides control over Web User Interface defaults, such as displaying a company logo, viewing participants' names, hearing participant entry tones, etc.
- **Comments:** Allows the host to see and make public/private any written comments made by participants at the conclusion of a conference or recording.

Personal Library Tab

The Personal Library Tab is accessible only to anyone who can sign into the Conference Web Portal. It is used to add, edit, or delete Pictures, Presentations, Video files, and Audio files stored either in the user's Personal Library or a Shared Library. Shared Library files can be viewed by anyone who is signed in to the Conference Web Portal.



My Profile Tab

The My Profile Tab allows you to upload your personal photograph. Photographs can be viewed by participants from the Public Conferences tab if you are the host of a conference. The photograph can also be viewed under Information in the Conference Viewer.



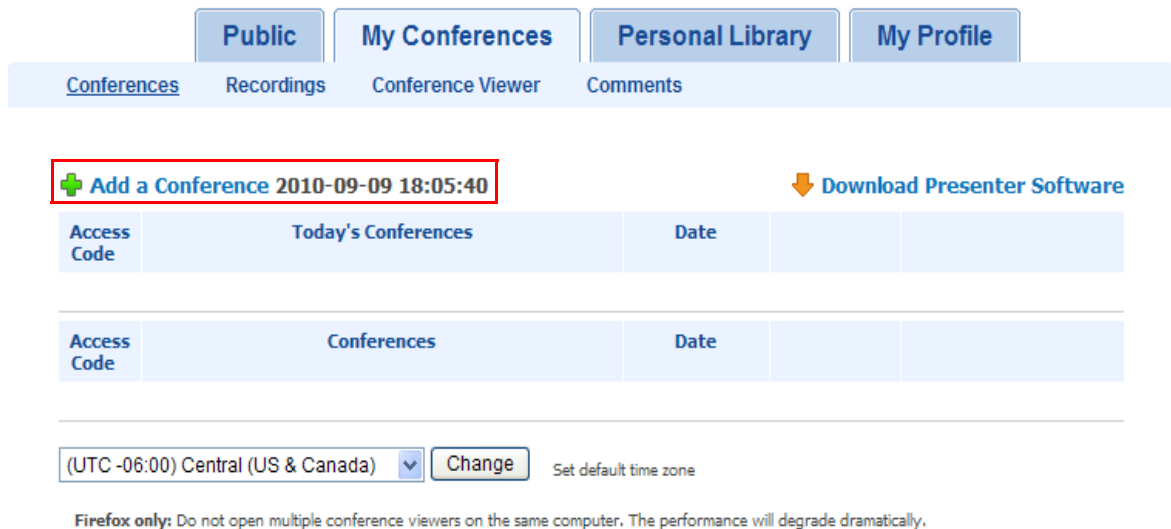
Scheduling a Conference through the Conference Web Portal

You can create conferences as reservationless or scheduled through the ShoreTel Conference Web Portal.

Scheduling a Conference

Once you are configured with conference permissions, you may schedule audio, web or audio/web conferences.

- Step 1 Access ShoreTel Conferencing through the URL provided by your system administrator.
- Step 2 Click the My Conferences tab.
- Step 3 Enter your User ID and password supplied by your system administrator.
- Step 4 Click Add a Conference.



The following screen appears:

Add a Conference

Conference Name

Date/Time Reservation-less: Start the conference anytime.
 Scheduled:
Date: Time: Duration:
 Add to my calendar (send an iCalendar file to me.)
Conference does not automatically start on the scheduled time.

Description

Login **Name:** Participants need to enter a name.
 Name/Password: Participants need to enter a name and a password.

Dial-in number and Access Codes Participant code:
Host code:
Phone: 5113

Participant Announcement Applies to audio conference only.
 None: No audio indication that a user has entered or left the conference.
 Tone: Audio tone when a user enters or leaves the conference.
 Detailed: Detailed message when user enters or leaves the conference. The user is prompted for their name.

[Show more options](#)

Step 5 Fill in the following fields:

- **Conference Name:** Enter a meaningful name for the conference.
- **Date/Time:** Determine the type of conference and the date and time for the conference.

Date/Time Reservation-less: Start the conference anytime.
 Scheduled:
Date: Time: Duration:
 Add to my calendar (send an iCalendar file to me.)
Conference does not automatically start on the scheduled time.

- **Reservation-less:** The conference can be started at any time.
- **Scheduled:** Enter a date, time, and duration for the new conference.

Note: By clicking the **Add to my calendar** check box, you receive an email with the iCalendar attachment.

- **Description:** Enter a meaningful description for the conference. This description is associated with the conference.
- **Login:** Implement security for accessing your conference. Options include participants entering their name, or entering their name and password as supplied by you.

Note: The conference password may only consist of standard ASCII characters. Non-ASCII characters are not supported.

- **Dial-in number and Access Codes:** The dial-in number and Access Codes for participants and for the host is automatically provided. You have the option to change the Access codes by highlighting the code and typing in your preferred code.

t

- **Participant Announcement:** You have the option to choose how a conference participant is announced when they join or leave the audio conference.

Participant Announcement Applies to audio conference only.

- None:** No audio indication that a user has entered or left the conference.
- Tone:** Audio tone when a user enters or leaves the conference.
- Detailed:** Detailed message when user enters or leaves the conference. The user is prompted for their name.

- **Show more options:** By clicking on **Show more options**, the following menu appears.

Conference Type Start the conference only when I join.
 Start the conference only when I join and list the conference on the public page.
 Start the conference when anyone joins.
 Start the conference when anyone joins and make everyone a presenter.

Outdial Prompt **Require Prompt:** Participants must press 1 to enter the audio conference.
 No Prompt: Participants are automatically added to the audio conference.

Comments **Allow public comments:** Participants can post a public comment of this conference.
 Private comments only: Participants can only send a private comment to me.
 Disable comments: Participants can not post a comment for this conference.

- **Conference Type:** You have the option to:
 - Restrict access to the conference until you, as the host, join.
 - Post the conference under the Public Conference tab and restrict access to the conference until you, as the host, join.
 - Allow the conference to begin as soon as a participant joins, even if you, as the host, are not present.
 - Allow the conference to begin as soon as a participant joins - even without a host - and allow any of participants to be presenters.
- **Outdial Prompt:** Determines how the host or a participant is prompted if they choose to be called to join the audio portion of the conference.
- **Comments:** Determines how participants' comments are managed for the conference.

Step 6 Once you have filled in the fields for you conference, click the **Submit** button.

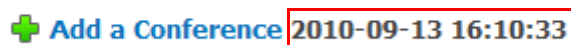


Note: The conference now appears under the **My Conferences Tab**. If you choose to post the conference under the **Public** tab, the conference also appears there.

The **Reset** Button clears your input and the **Cancel** button cancels the operation.

Setting Default Time Zone

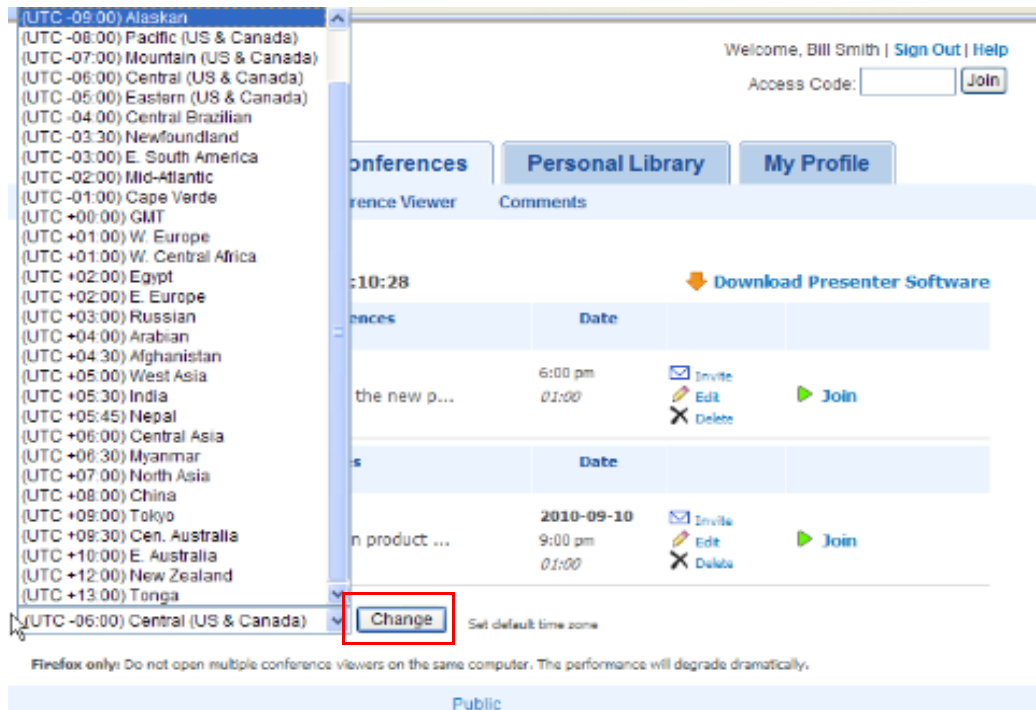
When you log into the **My Conferences** tab, you see the date and time displayed.



By default, this time is inherited from the time zone of your ShoreTel Headquarters server site. Your conferences also reflect this time.

If you are in a different time zone from the server, you can override the default by doing the following:

- Step 1 Access the My Conferences tab.
- Step 2 Click the down arrow key and choose your time zone.
- Step 3 Click Change.



Note: All of your conferences and conference invites reflect the time zone you have chosen.

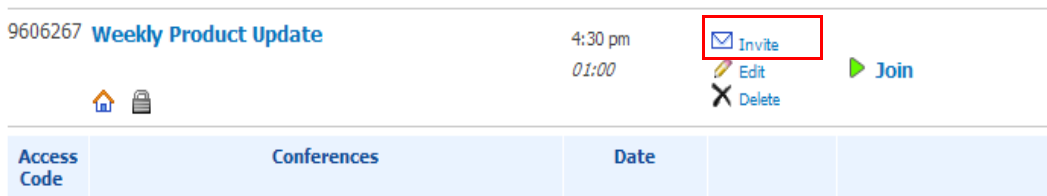
Inviting Conference Participants through the Conference Web Portal

Once a conference has been set up, you have the option to invite additional participants through the ShoreTel Conference Web Portal or through your default email application.

Note: If you have Outlook, use your Outlook contact list when you create a conference and invite additional participants. Your email invite allows you bring up your Outlook with the conference invite information already populated.

To invite additional participants:

- Step 1 Click **Invite** next to the scheduled conference.



Step 2 Complete the fields in the following window.

The screenshot shows a form titled "Conference Participant Join URL". It contains the following fields and options:

- Conference URL: <https://conference.shoretel.com/conference/8310828>
- Send from my default email application
- Open My Email button
- Send email from this page
- Email addresses of the person(s) you want to invite: (separated by a comma) - empty text box
- Name: My Conference
- Message: A ShoreTel conference call has been created for this conference. Use either of the following to join the call:
Call x3900 (Extension)
+1 (408) 962-2521 (Local dial in)
- Send Email button

- Enter the email addresses or email groups of the attendees you want to invite. Each entry is separated by a comma.
- The name of the conference is automatically populated.
- The message that appears on the invitation is automatically created. The default message contains:
 - The number to call for the audio portion of the conference.
 - The participant access code to enter the audio portion of the conference.
 - The link for the web portion of the conference.
 - The password to login to the conference (if required).
 - The date, time, and duration of the conference.

Note: You can change the message by highlighting the text and typing in the new message. The message invite also displays whatever is configured in the **Additional Calling Information** field.

A ShoreTel conference call has been created for this conference.
 Use either of the following to join the call:
 Call x3900 (Extension)
 +1 (408) 962-2521 (Local dial in)
 and enter the access code below.
 Participant code: 9606267

Or, click the link below:
 Participant: <https://conference.shoretel.com/conference/9606267>
 Test link: <https://conference.shoretel.com/test>

Password : michael1
 Date/Time : Saturday September 11, 2010, 4:30 pm (UTC-7:00)
 Duration : 01:00

Step 3 Click Send Email or Open My Email to send the email from your default email application.

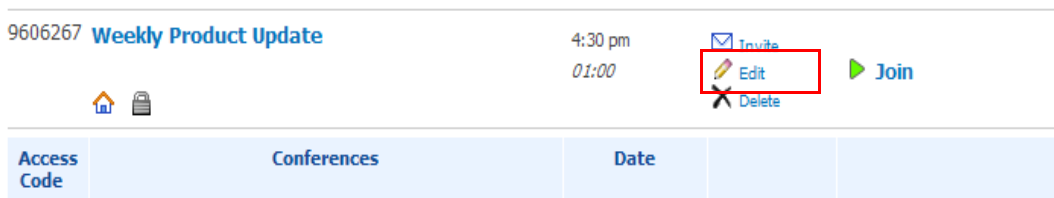
Editing Conferences

Use the Edit option to reschedule a conference, change the description, or any of the other options discussed in the Scheduling Conferences section of this document.

To edit an existing conference:

Step 1 Access the conference through the My Conferences tab.

Step 2 Click the Edit icon next to the desired conference.



Step 3 Make the desired changes in the following screen.

Conference Name Weekly Product Update

Date/Time Reservation-less: Start the conference anytime.
 Scheduled:
Date: Sep 11 2010 Time: 4 pm 30 Duration: 01:00
 Add to my calendar (send an iCalendar file to me.)
Conference does not automatically start on the scheduled time.

Description

Login Name: Participants need to enter a name.
 Name/Password: Participants need to enter a name and a password.
Password michael1 Up to 8 characters

Dial-in number and Access Codes Participant code: 9606267
Host code: 6606402
Phone: +1 (408) 962-2521

Participant Announcement Applies to audio conference only.
 None: No audio indication that a user has entered or left the conference.
 Tone: Audio tone when a user enters or leaves the conference.
 Detailed: Detailed message when user enters or leaves the conference. The user is prompted for their name.

[Show more options](#)

Submit Reset Cancel

Step 4 Click **Submit**.

Note: The **Reset** button resets the page to the original values. The **Cancel** button cancels the edit operation.

View Conference Page Option

The **View Conference Page** options summarizes information on a specific conference.

Step 1 Login to **My Conferences**.

Step 2 Click the **Edit** icon next to a specific conference.

Step 3 Click View Conference Page. .






Step 4 From this window, you can:


- Join the conference.
- View date, time, and duration of the conference.
- Download the iCalendar
- View Login information
- View Audio access information
- Post a comment if the conference allows for comments


Product Update

Hosted by: [Bill Smith](#)

 [Join](#)

 **Date/Time:** **Tuesday September 14, 2010 12:00 am**
 Duration: **01:00** (UTC-5:00)
 [Download iCalendar](#)

 **Login:** Participants need to enter a name.

 **Telephone:** 5113 Participant code: **2321914**

Recordings

By clicking on **My Conferences > Recordings**, you can find saved recordings, manage the location for saving the recordings, and play recordings. You can also invite others to play recordings initiated by you during the conference.

Step 1 Login to My Conferences.

Step 2 Click Recordings.



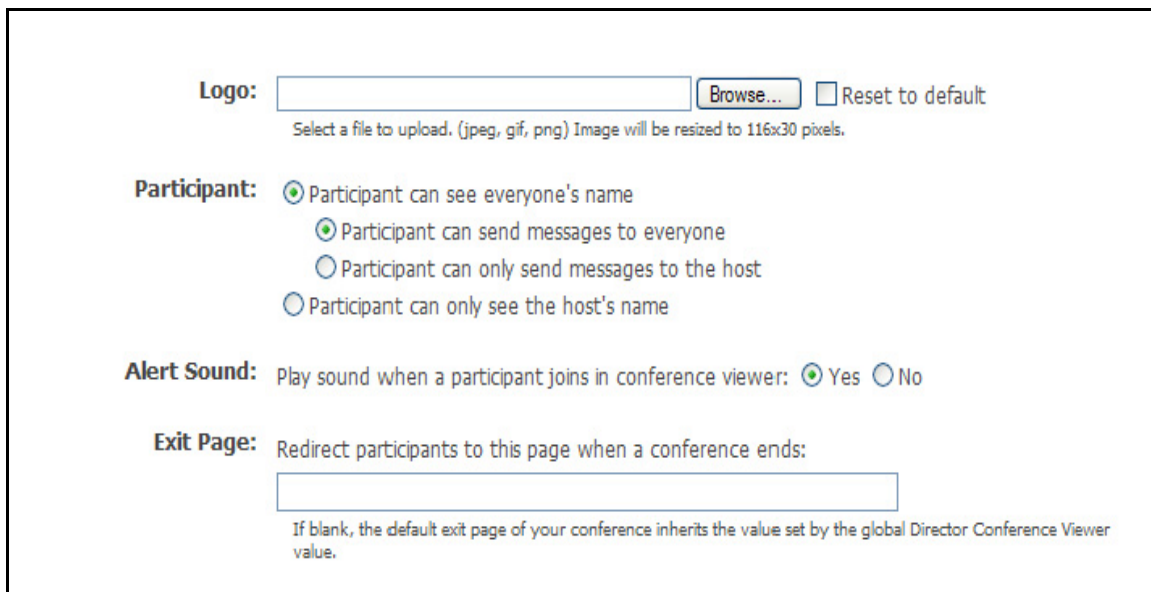
Step 3 View Recording folders or move recordings to new folders.

Conference Viewer

The Conference Viewer can be accessed from My Conferences > Conference Viewer and allows you to configure additional parameters for conferences.

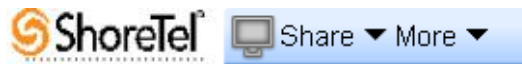
Step 1 Login in to My Conferences.

Step 2 Click Conference Viewer.



Step 3 Click on the desired parameters.

- **Logo:** You can upload a custom logo for a particular conference. The logo shows up in the upper left corner of the Conference page. If you do not upload a custom logo, the logo configured by System Administrator is used.



- **Participant:** Determine participant participation in the conference. Options include whether participants can see everyone in the conference and to whom they can send messages.
- **Alert Sound:** The sound alerts you when a participant joins the web conference.
- **Exit Page:** Redirects participants at the end of the web conference to a page of your choice. Participants are redirected after the conference ends.

Step 4 Click Submit.

Comments

Conference participants can post comments after viewing a conference or a recording using the comment post page. Whenever there is a post to a conference or recording, an email notification is sent to the host of the conference.

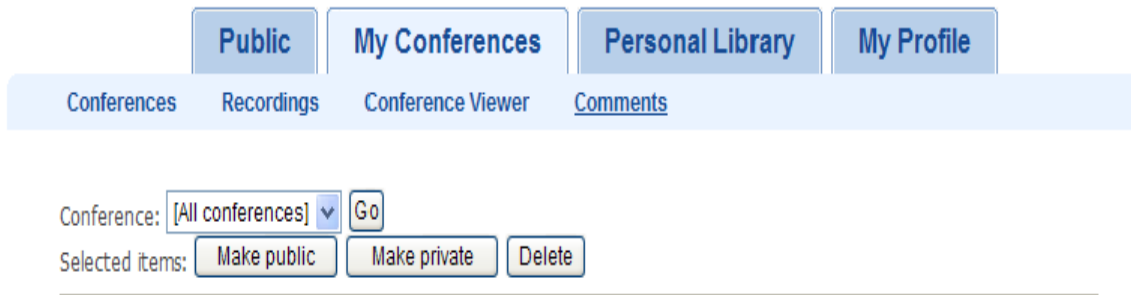
If the conference is public, you can click the conference **Info** icon and leave your comments.

i You can also post your comments to the public area or send it to the host.

As the host, under the **Comments** tab, you can see and make public/private any written comments made by participants at the conclusion of a conference or recording. As the host, you can also delete comments.

Step 1 Login in to My Conferences.

Step 2 Click on Comments.



Step 3 Choose **All Conferences** or a specific conference from the drop down menu and click **Go**.

Step 4 Select a comment from the column list and click a specific conference or recording:

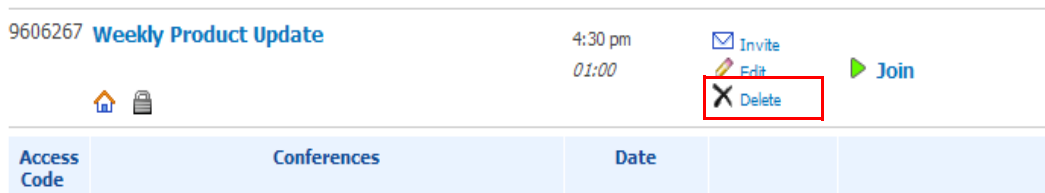
- **Make Public:** Comments can be seen by everyone under the **Public** tab.
- **Make Private:** Comments can only be reviewed by you.
- **Delete:** Deletes specific conference comments or comments for all conferences.

Deleting a Conference

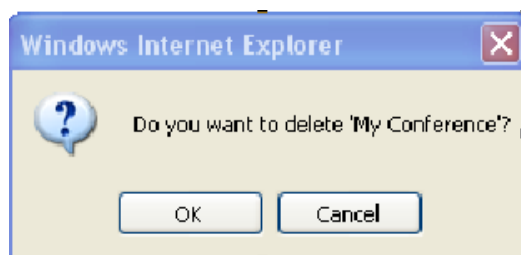
To delete or cancel a conference:

Step 1 Login to My Conferences.

Step 2 Click the **Delete** icon next to the specific conference.



Step 3 Click **OK** to delete the conference or click **Cancel** to cancel the operation.



Note: Participants will not automatically be notified of the cancellation of the conference.

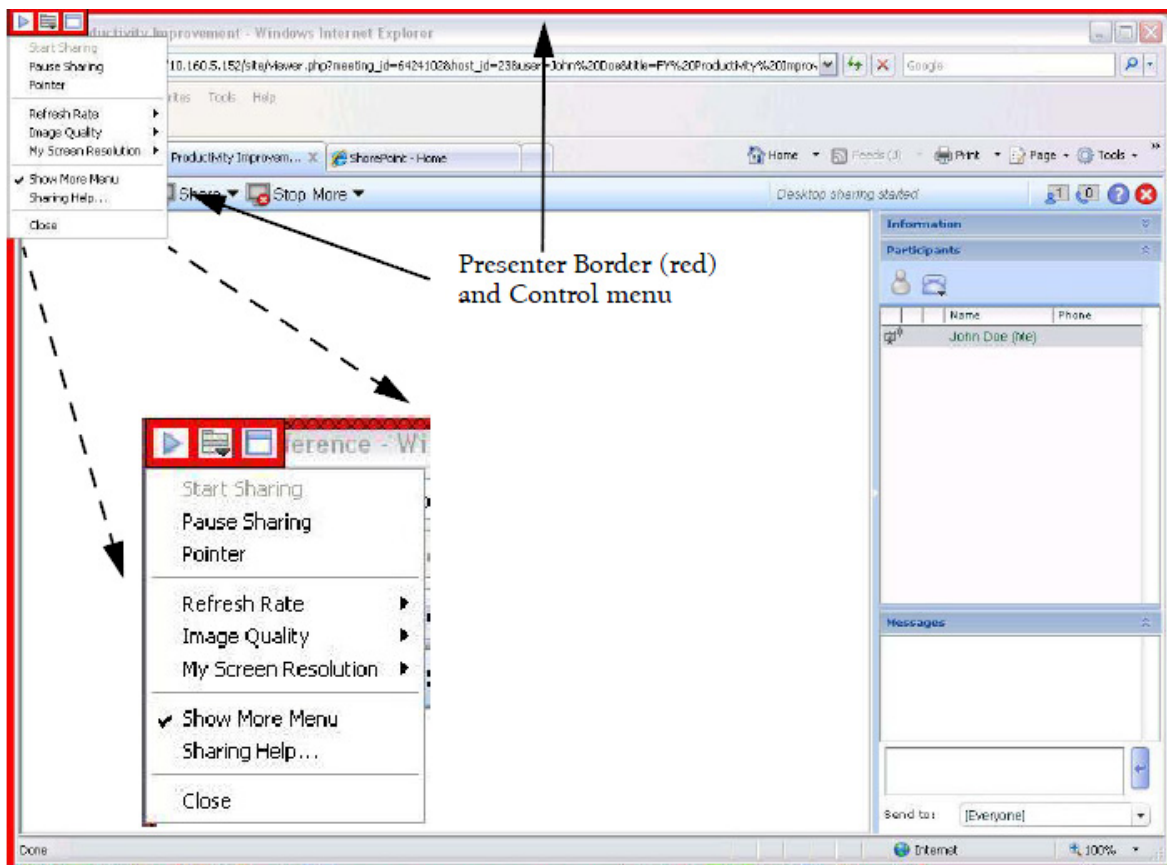
Joining and Hosting a Conference

Once an audio and/or web conference has been scheduled and invitations sent, the conference host and participants may join the audio and/or web conference in one of four ways:

- Participants follow an email link sent when the host scheduled the conference. The participant may call the conference number listed on the Audio Conference popup screen or have the service call them at a number of their choice¹.
- The participant may dial directly into an audio conference or follow an invite weblink if the information was provided to the participant in some other way (e.g. a forwarded invite email).
- The host may conference in a participant by requesting the Audio Conference Service to dial the participant's number from the Conference Viewer¹.
- If the conference was created as a public conference, a participant may join the conference directly from the **Public** tab of the ShoreTel Conferencing website. Once they are participating in the web conference, the participant can direct the Audio Conference Service to call their number¹.

¹ If an internal extension is requested that has a site prefix, the full extension (i.e. extension prefix + user extension) must be dialed.

Any of these methods allow the participant to join the audio conference. If participants are also joining a web conference, the Conference Viewer launches.



Once the conference has begun, the host and participants have multiple options for controlling and facilitating a conference. While a conference can only have one host, any participant may present with the permission of the host.

Feature/Option	Host	Participant
Call Me	X	X
Mute/Unmute	X	X
Present/Draw	X	X*
Access Online Help	X	X
Chat with an individual or everyone in the conference	X	X
Leave conference		X
End conference	X	
Hang Up	X	
Raise/Lower Hand		X
Mute/Unmute All	X	
Call Participant	X	
Send invitation	X	
Record conference	X	
Lock conference	X	
Restart Conference	X	
Share (desktop, library, whiteboard), send files, import presentation	X	X*
Remove participant	X	

*Presenter permission is granted by the host.

Joining a Conference

Participants can join the conference by following the email link sent by the host or accessing the conference through the Public tab.

Joining the Conference from an Email Invite

To join the conference from :

- Step 1** Open the email invitation sent to you by the conference host.
- Step 2** Click the link in the email to join the web portion of the conference.

A ShoreTel conference call has been created for this conference.
 Use either of the following to join the call:
 Call x5113 (Extension)
 and enter the access code below.
 Participant code: 1368841

Or, click the link below:
 Participant: <http://10.160.5.152/conference/1368841>
 Test link: <http://10.160.5.152/test>

Date/Time : Thursday September 09, 2010, 6:00 pm (UTC-5:00)
 Duration : 01:00

~~~~~

Note: Click the **Test Link** if you have a problem accessing the conference. This link identifies any potential problems.

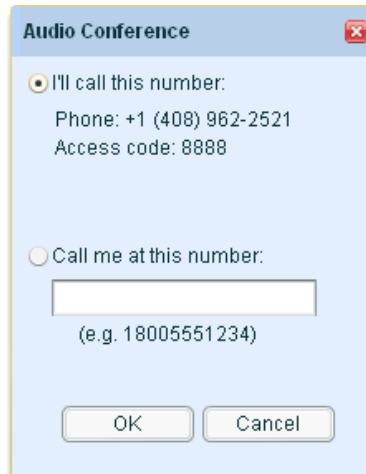
| Component                                                                                                    | Check   |
|--------------------------------------------------------------------------------------------------------------|---------|
| <b>Operating System</b><br>Detected: Microsoft Windows                                                       | Success |
| <b>Web Browser</b><br>Detected: Internet Explorer 7<br>Required: Internet Explorer 8, Firefox 3.6, Safari 4. | Fail    |
| <b>Browser Cookies</b><br>Detected: Cookies are enabled.                                                     | Success |
| <b>Adobe Flash</b><br>Detected: Adobe Flash 9 or greater                                                     | Success |

**Step 3** You might be prompted to enter your name or a name and password, depending on how the host configured the conference parameters. The login information is included in the conference invite.

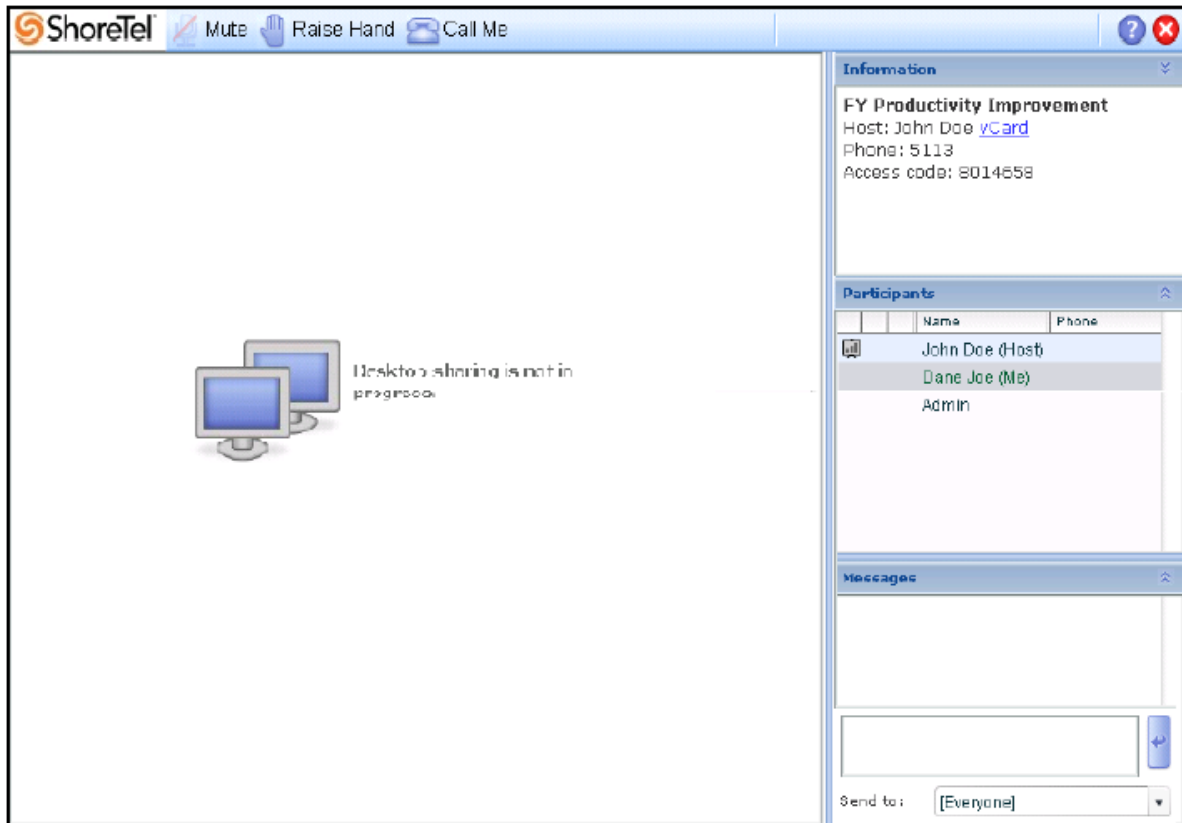


**Step 4** Once the conference opens, you are prompted to access the audio portion of the conference. Your options are to call the number or have the conference call you at a designated number. Click OK<sup>1</sup>.

<sup>1</sup> If an internal extension is requested that requires a site prefix, the full extension (i.e. extension prefix + user extension) must be dialed.



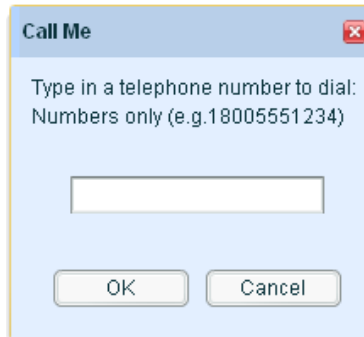
The conference screen appears.



- **Mute:** A participant can mute and unmute themselves in the conference.
- **Raise Hand:** By clicking Raise Hand, you are alerting the conference leader that you want to be recognized.
- **Call Me:** By clicking Call Me, you are asking the conference host to call you at a certain number<sup>1</sup>.

<sup>1</sup> If an internal extension is requested that requires a site prefix, the full extension (i.e. extension prefix + user extension) must be dialed.

The following screen appears:



- **Information:** Lists the information on the conference, including the conference name, the host, the call-in number, and the access code.
- **Participants:** Lists the participants and their phone number. In addition to displaying an audio icon for each participant and the host, there is an indication of who is currently speaking.
- **Messages:** Allows you to send a messages to a participant or to all participants from the drop down menu. You can also view messages from other participants.

**Step 5** To leave the conference, hang up and close the browser.

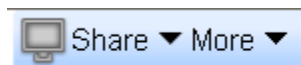
## Hosting a Conference

When you create the conference, you become the host of the conference. As host, you have more features available to you to manage the conference, including sharing applications and your desktop, giving participants permissions, recording conferences, etc.

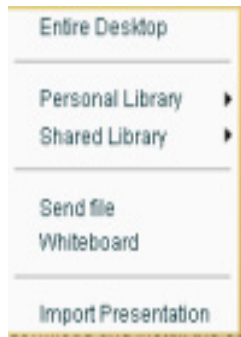
**Step 1** Access the ShoreTel Conferencing URL.

**Step 2** Login to **My Conferences** and click the **Join** icon next to the conference you want to start.

You now have the ability to:



- **Share:** You have the ability to share your Entire Desktop, Personal Library, and Shared Library. You can also open the Whiteboard, upload a file and import a presentation.

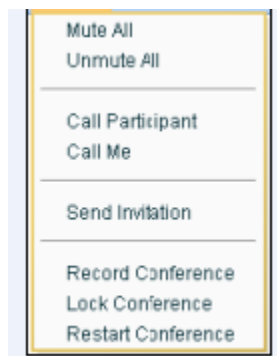


Sharing can also be initiated from the Conference Viewer by clicking on the white arrow icon.



**Click here to start sharing your desktop.**

- **More:** The More drop down menu allows you to manage the conference. You can mute/unmute all of the participants, call a participant or have the conference appliance call you, send an invitation, record a conference, lock the conference, and restart a conference.

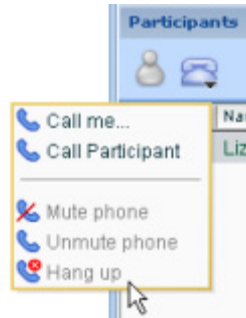


**Note:** After locking the conference, additional participants are not allowed to join.

**Note:** If the capacity of the conferencing appliance is at maximum and the host of the web conference restarts the conference (by pressing "More", then "Restart Conference"), all web participants in that conference will get re-directed to the Conference Web Portal. They will receive an error message "Web capacity is full on this Service Appliance. Please try again later."

This is by design to avoid overloading the conferencing appliance. Participants will be able to rejoin web conference within a few minutes. The audio participants are not affected

- On the Participant's panel, you can manage the audio portion of the conference.



## Sharing The Desktop

You can share your desktop with the participants using Windows Presenter. Mac users use Java Presenter.

### Initiating Desktop Sharing

**Step 1** After starting the conference, click **Share**.

**Step 2** From the drop down menu, choose **Entire Desktop**. Your entire desktop is surrounded by a red frame.

Once the desktop sharing is initiated, you have tools to manage the desktop sharing.

- **Pause:** Allows you to pause the desktop sharing. The central screen is blank until you restart the desktop sharing.



- **Desktop Sharing Tools:** This drop down menu provides tools for managing the quality of sharing your desktop and applications. Tools include :



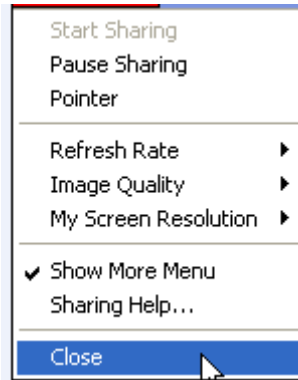
- **Pointer:** Available to move around and point to items on your desktop or in an application.



- Tools for managing your image quality and screen resolution.
  - **Refresh Rate:** Determines how much data is transmitted. Options are low, medium, and high. Default is medium.
  - **Image Quality:** Determines the image quality of the data. Options are low, medium, and high. Default is medium.



- **My Screen Resolution:** Determines the resolution of your screen. Options include Original, 1024X768, and 800X600. Setting the resolution can impact how participants see your desktop sharing. Default is Original.

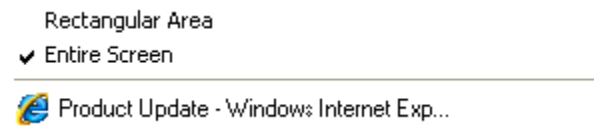


- **Sharing Help:** Explanation for desktop sharing tools.
- **Close:** Close desktop sharing.

- **Choose Sharing Window:** This option allows you to determine how much of your screen you want to share.



You can determine which Rectangular area to share and also which applications to share.



## Ending Desktop Sharing

Step 1 Click the Stop icon on the Tools icon.



or

Click Stop. A user may also select Close to end desktop sharing.



## **Sharing Applications and Presentations**

Conference hosts can share audio, video, pictures, and presentations during a conference. These applications, with the exception of Microsoft Powerpoint presentations, must be preloaded and stored in your private library or the system public library.

## **Managing the Library**

Users can manage and view their private library or the system public library of a variety of media. To access the library management page:

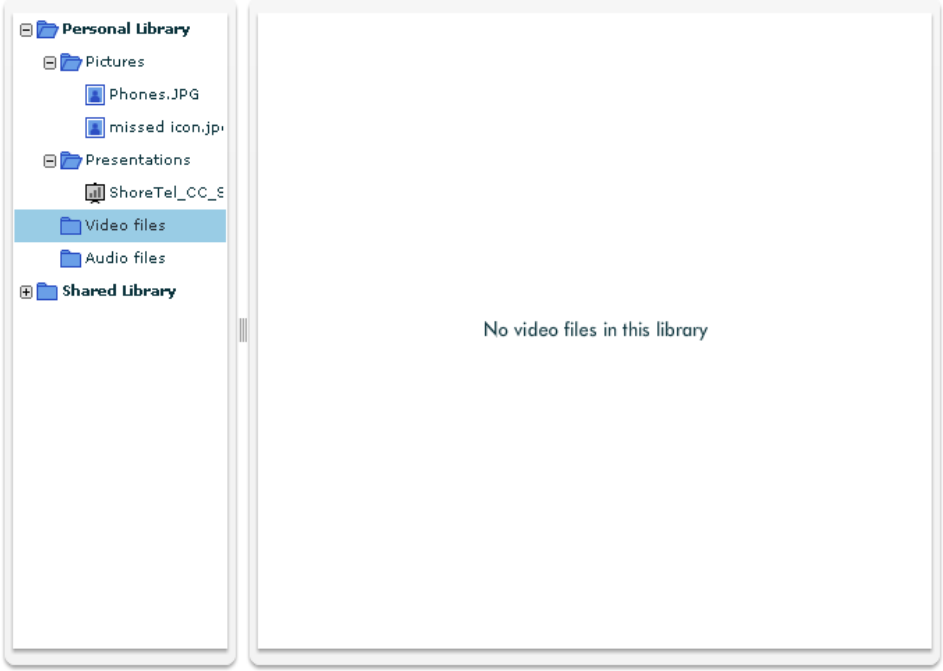
To add a medium to the Library:

**Step 1** Log in to the ShoreTel Conference web site and click on the **Personal Library** tab.

You can add media, delete media or edit the content of the library.

Public My Conferences Personal Library My Profile

+ ADD X DELETE ✎ EDIT



- **Import Pictures:** Pictures must be .jpg files. Recommend no more than 200KB per picture.

- **Import Presentations:** You have multiple ways to import a presentation:


- Export presentations to JPEG files and upload the files using the Personal Library Add Button.
- To retain animations, export presentations to Flash files with third party programs and upload the files using the Personal Library Add Button.

- **Import videos:** A video file must be encoded in the FLV format before you can upload it to the Personal Library. There are third party FLV video encoders that you can use.

- **Import Audios:** Audios must be .mp3 files.

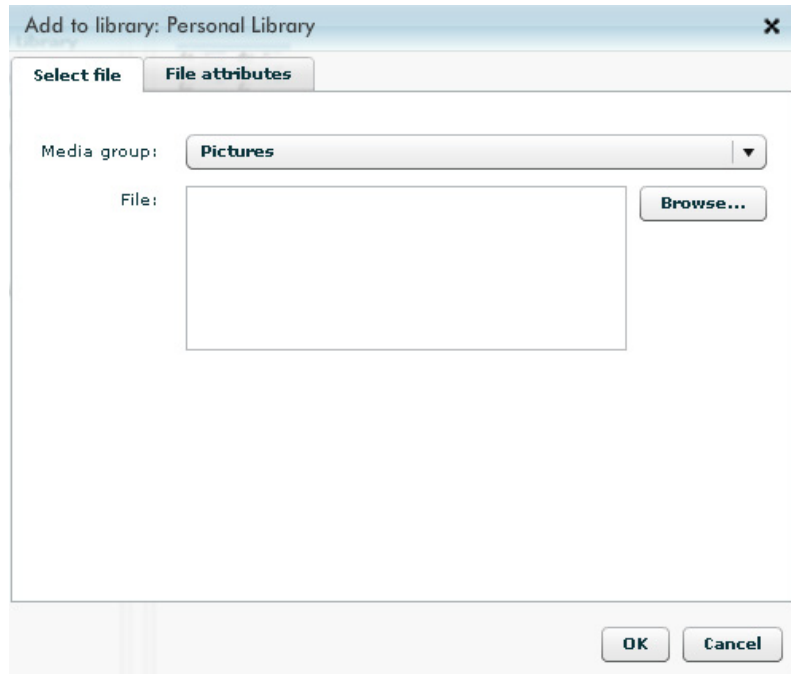
- Max. upload size per file: **2 MB.** Max. upload time per file: **30 sec.**

Public

Powered by  ShoreTel

Version 17.6.8505.0

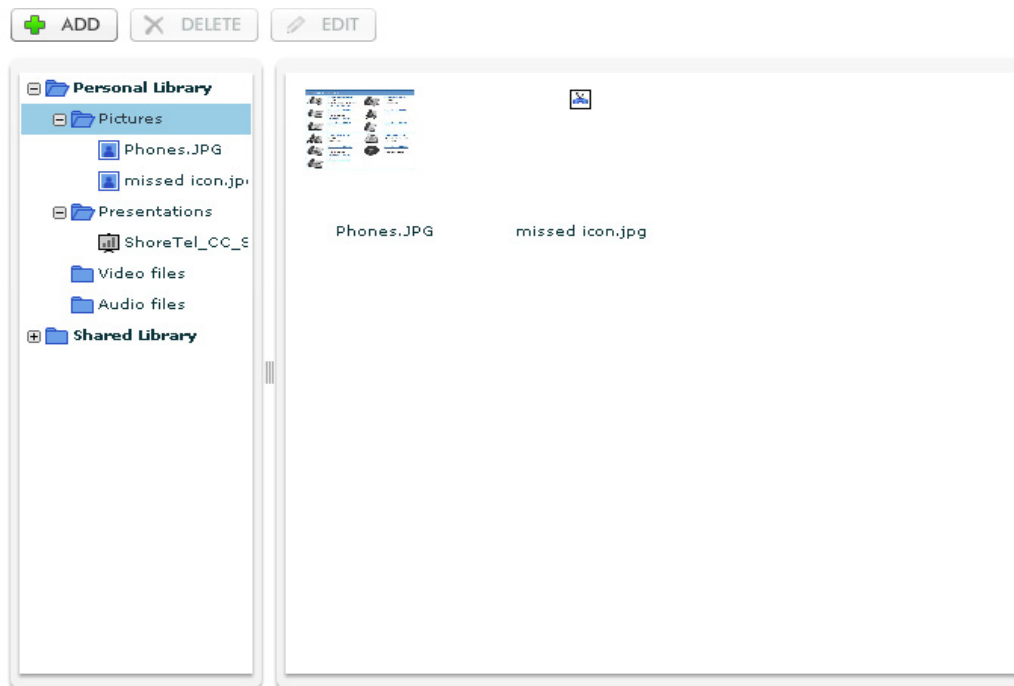
**Step 2** Click on the medium type you want to add in either **My Library** or **Shared Library** and then click **ADD**. The type of files you can add to the library are explained below the window.



**Step 3** Click **Browse** and follow the prompts to upload the medium.

**Step 4** Click **OK**.

The uploaded mediums are displayed on the screen.



To delete an entry in the Library:

**Step 1** Log in to the ShoreTel Conference web site and click on the **Personal Library** tab.

**Step 2** Highlight the Personal library entry you want to delete.

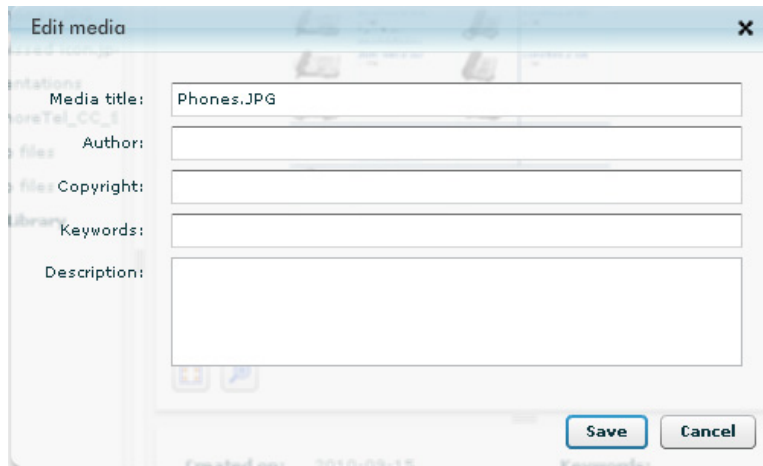
**Step 3** Click **Delete**.

**Note:** Library entries must be deleted by the owner. Public content can be deleted by anyone.

To edit an entry in the Personal Library:

**Step 1** Log in to the ShoreTel Conference web site and click on the **Personal Library** tab.

**Step 2** Highlight the library entry you want to edit.



**Step 3** Complete the entries.

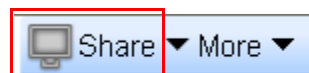
**Step 4** Click **Save**.

## **Sharing Presentations**

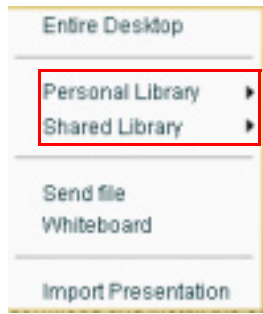
You can share your presentations from the Library or upload it during a conference.

To share a presentation from the Library:

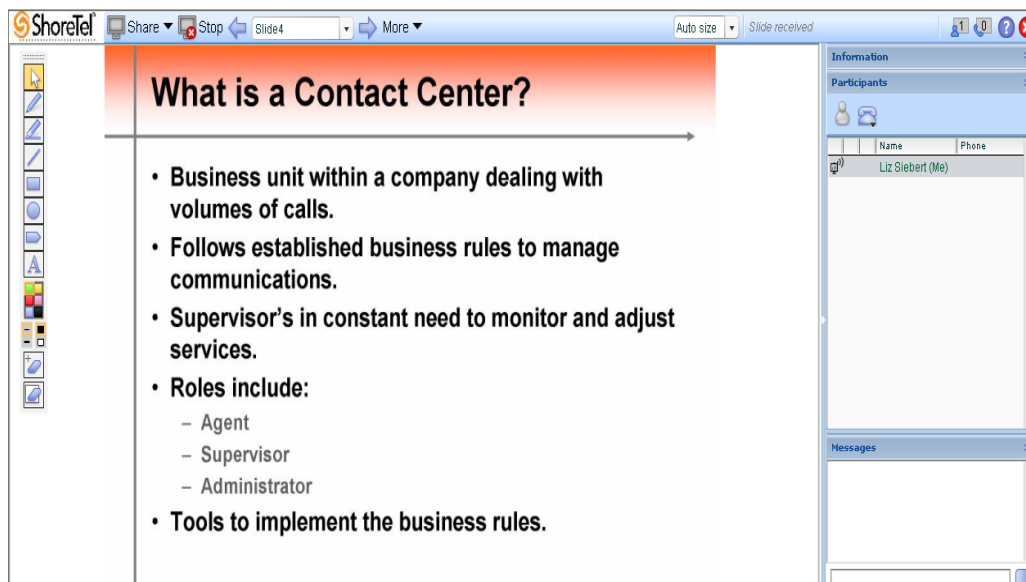
**Step 1** Click on **Share**.



**Step 2** Click on Personal Library or Shared Library.



Step 3 Select the presentation.



Note: You have the tools from the Whiteboard to add and edit the presentation.

To upload a presentation during a conference:

Step 1 Click **Share**.

Step 2 Click **Import Presentation**. (Not available on a Mac.)

Step 3 Follow the prompts to upload the presentation.

You can then share the presentation with the conference participants.

Note: Presentations take some time to load.

Use the arrow keys or the drop down menu to move through the presentation.



Step 4 Click X or Stop to end the presentation.



## Using the Whiteboard

Presenters can use the whiteboard to create and share drawings. Drawings have basic drawing forms of lines, shapes, text, color, and a pointer. Drawings can be recorded during the conference and the control for drawings can be passed to participants.

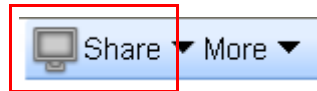
Multiple whiteboards can be created in the same conference. Whiteboards can be deleted but there is always one whiteboard open. Stopping a conference cleans up all whiteboard sessions.

Objects can be moved in the whiteboard. You can erase a single object or the entire whiteboard.

## Accessing and Using the Whiteboard

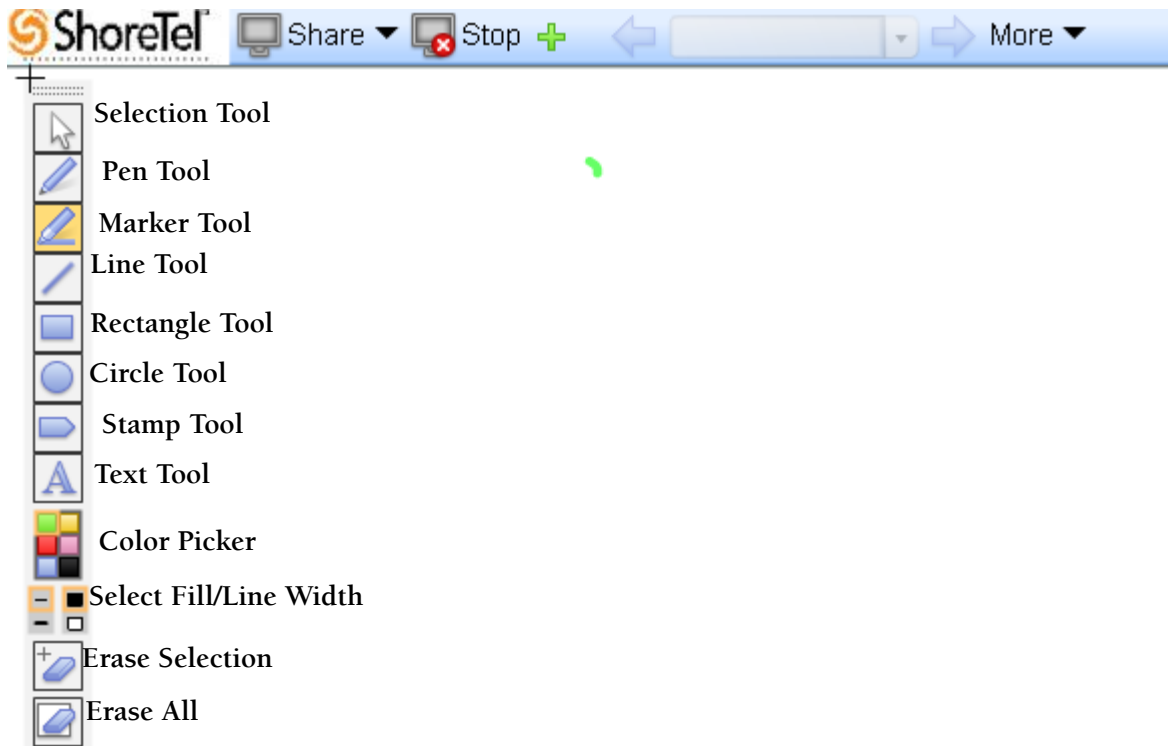
Step 1 Open the conference as the host.

Step 2 Click Share.



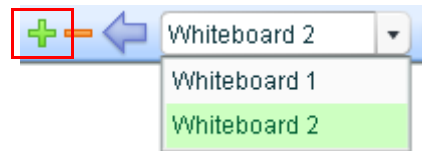
Step 3 From the drop down menu, choose **Whiteboard**.

The following menu appears with the drawing tools.



Step 4 Use the tools to create text or drawings.

Step 5 Add additional White Boards by clicking the + icon.



The arrow keys on either side of the drop down menu allow you to cursor through the available whiteboards.

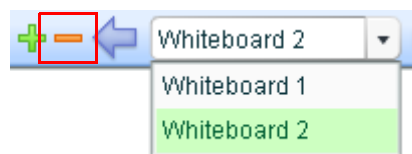
Note: To save the whiteboards, record the conference.

### Deleting the Whiteboard

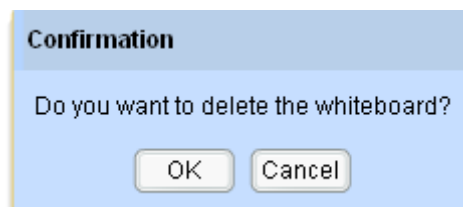
Whiteboards are deleting when you leave the session or:

Step 1 Highlight the Whiteboard from the drop down menu.

Step 2 Select the - icon.



Step 3 A confirmation message appears.



### Exiting the Whiteboard

To exit the Whiteboard, click X or Stop.



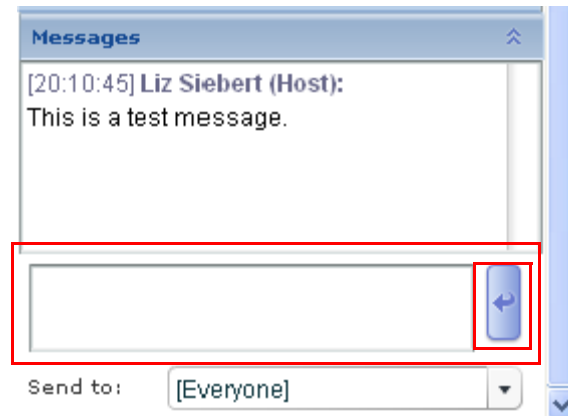
### Chat Messaging

The conference host can send written messages to everyone in the conference or a single participants. The participant's reply can be viewed by all of the conference participants or restricted to a single participant.



To send a chat message:

**Step 1** Type the message in the message area.



**Step 2** Choose whom to send the message to from the drop down menu.

**Step 3** Click the arrow to send the message.

**Step 4** Messages can be viewed by opening the message window.

## **Presenter Control**

During a conference, the host can delegate presentation controls to any participant. The participant can have presentation control over the following:

- screen share
- whiteboard drawing
- Library share
- Send or upload file
- Import presentations if not on Mac

The host can not pass audio control to the participant. After the host passes the control to a participant, the host continues controlling the participant list (mute, lock etc...).

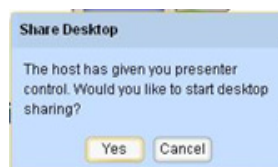
### **Delegating presenter control:**

**Step 1** Highlight the participant to whom you want to pass control

**Step 2** Click Participant Options.

**Step 3** Select Allow Presenting.

**Step 4** The participant with the presenter control receives a message.



The presenter now has control of the sharing features.

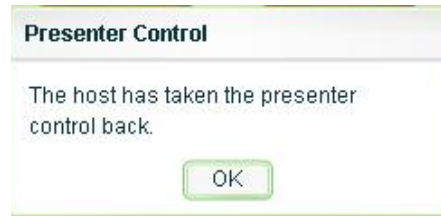
### Ending Presenter Rights

**Step 1** Highlight the participant with the presentation controls.

**Step 2** Click the **Participant Options**.

**Step 3** Select **Discontinue Presenting**.

The participant with the presenter control receives a message.



## Downloading Presenter Software

Desktop sharing and importing Power Point presentations requires a Presenter Client when not using ShoreTel Communicator. Two options are available:

- Windows Client - Recommended for Windows users. The download is required.
- Java Presenter - Recommended for all users. May be utilized on Windows or Mac.

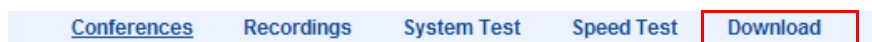
The Java Presenter offers a subset of the features available through the Windows Presenter client. Therefore the Windows client is recommended. Users utilizing the Java client will be unable to perform the following:

- User cannot perform desktop sharing on a secondary monitor using Java Presenter.
- User cannot perform desktop sharing across multiple monitors using Java Presenter

Presenter software can be downloaded from the **Public** tab or from the **My Conferences** tab.

From the **Public** tab:

**Step 1** Click on the **Download** option from the **Public** tab.



**Step 2** Follow the prompts to download the software to your desktop.

From the **My Conferences** tab:

**Step 1** Log into the **My Conferences** tab.

**Step 2** Click on the **Download Presenter Software** arrow.



Step 3 Follow the prompts to download the software to your desktop.

## Conference Recording

The host can record a conference and save the recording for future review. Recordings can be audio only, web only or a combination of both.

Hosts can organize recordings in folders. Hosts can send out email invites to participants to view the recordings. Conference hosts can also delete recordings or change the setting property of the recording.

### Recording a Conference

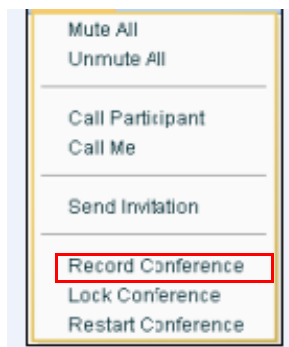
To record a conference:

Step 1 Open a conference as the host.

Step 2 Click **More**.



Step 3 From the drop down menu, choose **Record Conference**.



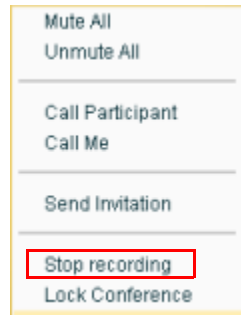
**Note:** A recording is defined by a start/stop recording sequence. Many recording items can exist for the same conference session.

### Stopping Recording

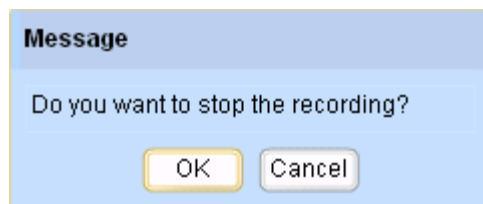
To stop the recording:

Step 1 Click **More**.

Step 2 From the drop down menu, choose **Stop recording**.

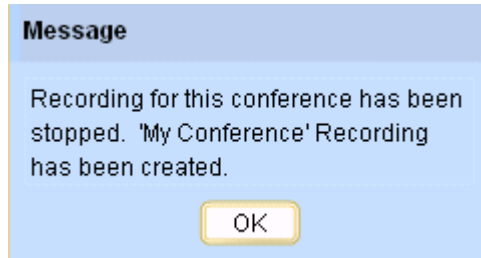


A confirmation message is displayed.



Step 3 Click OK.

A confirmation message is displayed.



Recordings are automatically added to the recordings list.

## Managing Recordings

Recordings made during a session are automatically added to the recording list under the recording tab. This list shows every recording recorded by the user. Recording owners can:

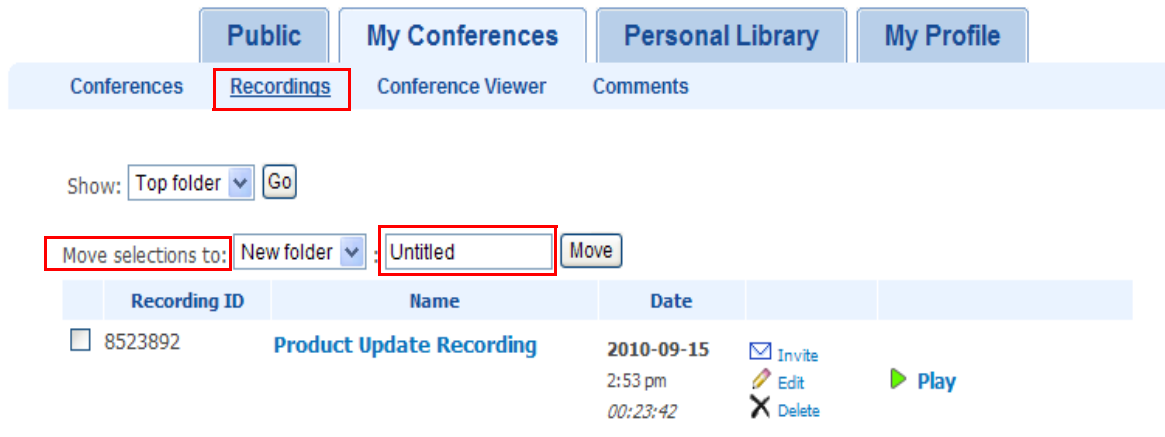
- Organize their recordings into folders using the folders option menu.
- Send email invites out to participants to view or listen to the recordings.
- Change property settings or delete recordings.
- View and listen to recordings.
- Download the audio portion of the recording

Participants can:

- View and listen to recordings.
- Download the audio portion of the recording

## Managing the Recordings List

Under the Recordings option in the My Conferences window, you can manage the folders in which to save the recordings, invite participants to listen/view the recordings, edit/delete the recordings or play the recording. From this option, it is also possible to download the audio portion of the recording.



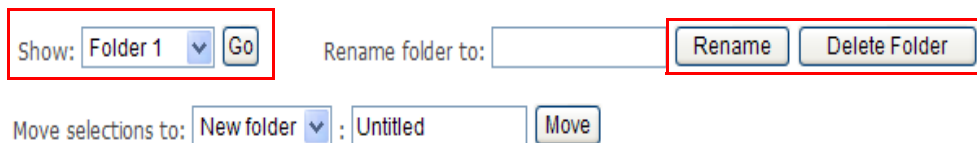
## Managing Folders

To move a recording to a folder:

- Step 1** Click the box in front of the recording.
- Step 2** Go to **Move selection to:** and move the selection to a folder in the drop down menu or highlight the **Untitled** area and type in the name of a folder.
- Step 3** Click **Move**. The recording is moved to the new folder.
- Step 4** To access the recording, set the **Show** drop down menu to the folder and then press **Go**.

To rename a folder:

- Step 1** Choose the folder you want to rename from the **Show:** drop down menu.



- Step 2** Enter the new name in the blank and click **Rename**.

To delete a folder:

- Step 1** Choose the folder you want to delete from the **Show:** drop down menu.
- Step 2** Click **Delete Folder**.

## Inviting Participants

- Step 1 Access the recording by going to the **Recordings** option or to the recording folder.
- Step 2 Click the **Invite** icon next to the recording.
- Step 3 Enter the email addresses of the persons you want to invite and send the email or use your default email application to send it.


## Editing the Recording

- Step 1 Access the recording from the Recording List or from the saved folder.
- Step 2 Click the **Edit** icon next to the recording.


### Product Update Recording

 [View Recording Page](#)

**Recording Name**


 **Date/Time** Recorded on **2010-09-15 2:53 pm** Duration **00:23:42**


**Description**

 **Login**  **None**  
 **Name:** Participants need to enter a name.  
 **Name/Password:** Participants need to enter a name and a password.

▶ **Show more options**

- Step 3 Determine **Login** options for the participants accessing the recording.
- Step 4 Under the **Show more options** field, determine where to publish the recording.

 **Publish**  **Private:** List in My Conferences page only.  
 **Public:** List in My Conferences and the Public page.

 **Comments**  **Allow public comments:** Guests can post a public comment of this conference.  
 **Private comments only:** Guests can only send a private comment to me.  
 **Disable comments:** Guests can not post a comment for this conference.

- Step 5 Determine whether to allow comments and what type of comments.
- Step 6 Click **Submit**.

## Deleting the Recording

**Step 1** Access the recording through the **Recording** option in the **My Conferences** window.

**Step 2** Click the **Delete** icon next to the recordings.

## Listening to Recordings

You, as the host, can listen to recordings by accessing the **Recording List** or the folder in which the recording is located. Click **Play**.

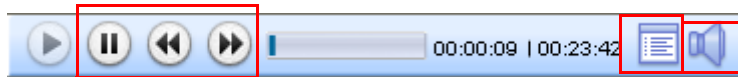
The host and participants can play or download the audio portion of the recording.

To play the recording:

**Step 1** Access the recording through the email invite or by going to the ShoreTel Conference Web Portal and choosing the recording under the **Public** tab, **Recordings** options.

**Step 2** Click on the **Play** icon next to the recording.

**Step 3** Use the recording tools to manage playback.



You can mute the audio by clicking on the **Mute Audio** button.

You can review the length of the event by clicking the **Event** button.

**Step 4** To exit the recording, click X on the top right hand corner of the screen.

## Downloading the Audio Portion of the Conference

Participants can download the audio portion of the conference.

To download the audio portion of the conference:

**Step 1** Access the recording by going to the ShoreTel Web Conferencing URL and choosing the recording under the **Public** tab, **Recordings** options.

**Step 2** Click the **Download Audio** icon next to the recording.

**Step 3** Follow the prompts to save the file to your desktop.

## Telephone Commands for Audio Controls

The following telephone commands are available for controlling the audio portion of the conference:

| Description                                        | Key Sequence |
|----------------------------------------------------|--------------|
| Turn hold music on and off                         | 1            |
| List commands and their corresponding key sequence | #8           |
| Mute/unmute own audio                              | #1           |
| Host mutes/unmutes audio of participants           | #2           |
| Host dials out to add participant                  |              |

| <b>Description</b>                                                      | <b>Key Sequence</b> |
|-------------------------------------------------------------------------|---------------------|
| Host can start and stop recording conference                            | #4                  |
| Host can lock/unlock conference so additional participants cannot join. | #5                  |
| Host ends audio and web conference                                      | #99                 |