

# ShoreTel Conferencing – Quick Reference Guide

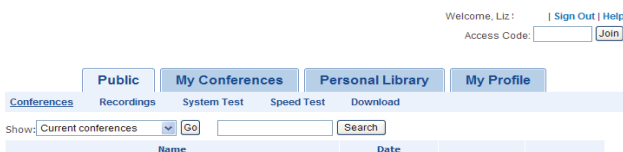
## Conference Types

- **Reservationless:** Conferences that have no fixed time or date.
- **Scheduled:** One time or recurring conference scheduled through Outlook.
- **Instant:** Spontaneous conference in response to an immediate need, using ShoreTel Communicator.

## Creating a Reservation-less Conference

1. Open a browser window and type in the web link for ShoreTel Conferencing supplied by your system administrator.

The Conference Web Portal appears:



2. Click **My Conferences** tab and login with the User ID and password supplied by your system administrator.
3. Click **Add a Conference**.



4. Click **Reservation-less** and complete the fields in the **Add a Conference** window.
5. Click **Submit**.

## Integrating with Microsoft Outlook

1. Click **Tools**, then **Options...** in ShoreTel Communicator. Select **Outlook**.
2. Click **Install** under the Calendar heading.

## Scheduling a Conference Through Outlook

1. Create an appointment or meeting in **Outlook**.
2. Press the **Conference** button on the top Outlook toolbar.

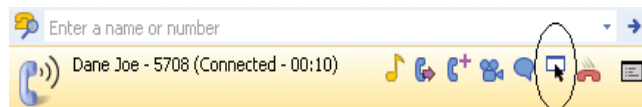


The conference information for the participant is added and displayed in the Outlook appointment body. It includes date, time, duration, link for the web conference, and dial in number information.

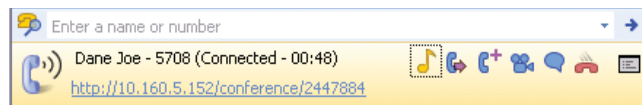
3. Adjust the conference settings by selecting the **Conference** button and from the drop down menu, selecting **Settings** and **Advanced Options**.
4. Click **Send**.

## Starting an Instant Conference

1. Click the **Start Instant Conference** icon in the Communicator call cell when in an active call.



2. The Conference Viewer automatically launches and a web link appears in your Communicator call cell.

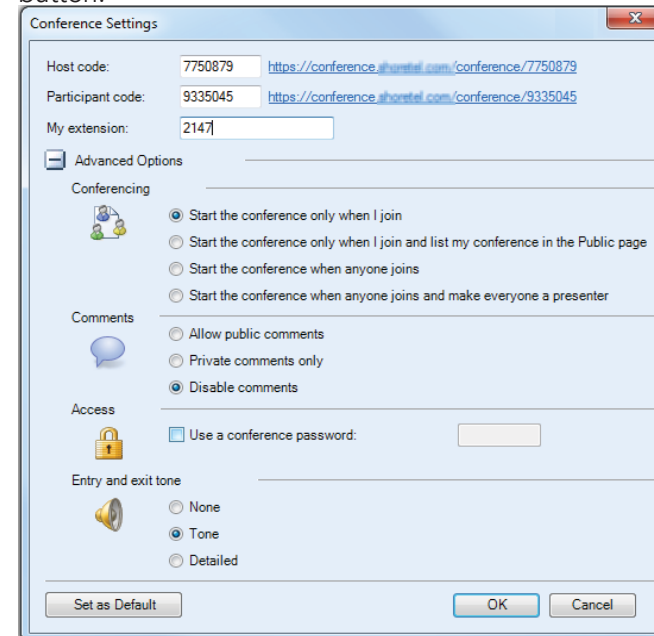


To join an Instant Conference as a participant:

1. Click on the weblink or prompt that appears in your Communicator call cell.
2. The Conference Viewer automatically launches.

## Conference Settings and Advanced Options

Conference settings are available in Outlook by clicking on the dialog launcher in the corner of the **Conference Ribbon** or by selecting **Settings** from the **Conference** button.



- **Host Code:** Automatically provided and can be customized.
- **Participant Code:** Automatically provided and can be customized.
- **My Extension:** Automatically populated.
- **Advanced Options:**

Conferencing: Determines when the conference is started.

Post Conference Comments: Determines whether participants can post comments upon exit.

Access: Determines whether a participant password is needed to access the conference.

Entry and exit tone: Determines the type of announcement made when a participant enters or exits the conference.

These settings can be set as **Default** and used for all scheduled conferences.

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## Joining a Conference as a Host

From Outlook:

1. Open your Outlook appointment or meeting.
2. Click the **Join Conference** button in the top Outlook bar.

From the Conference Web Portal:

1. Login to **My Conferences**.
2. Click the name of the conference.

From the ShoreTel IP Phone:

1. Open your Outlook appointment or meeting.
2. Click on Conference Button Menu
3. Select Settings
4. Note your Host code
5. Dial in using the Host code Login to **My Conferences**.

## Joining a Conference as a Participant

From Outlook:

1. Open the email invite.
2. Click the link in the email text to join the conference.
3. Call into the audio conference by dialling the number supplied in the email invite.

From the Conference web Portal:

1. Click on the web link provided in the conference email invitation.

## Recording a Conference

To record a conference for later viewing:

1. Click **More** during the conference.
2. From the drop down menu, choose **Record Conference**.

To stop the recording, choose **Stop recording**.

Recordings are automatically added to the recording list.

## Sharing Your Desktop

1. Click the desktop sharing icon.



Your entire desktop is surrounded by a red rectangle.

A sharing control toolbar shows up at the middle top of your screen:



**Pause:** Pause desktop sharing.



**Stop:** Ends desktop sharing.



**Show Menu:** Pointer, desktop sharing control, modify screen resolution.

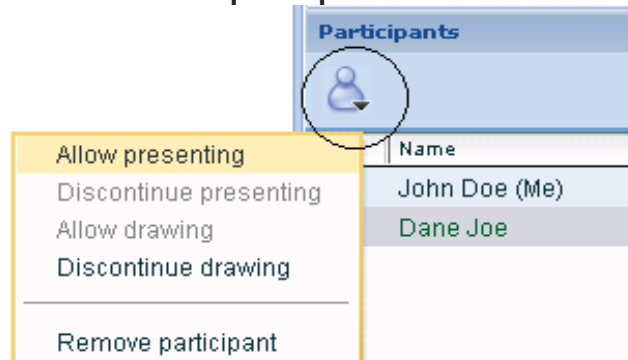


**Choose sharing window:** Area of desktop/ files to share.

## Giving Presenter Control

During a conference, the host can give presenter rights to any participant.

1. In the participant list, highlight the participant you want to pass the control to.
2. Select **Participant Options**.



3. Select **Allow presenting**. The participant receives a message and has control over the presentation.

To end presenter delegation:

1. Highlight the participant with the presentation.
2. Click **Participant Options**.
3. Select **Discontinue presenting**.

## Sharing Presentations

You can share presentations during a conference. Presentations can be saved in the library or uploaded during the conference.

To share a presentation from the library:

1. Click **Share**.
2. Click **Personal Library** or **Shared Library**.
3. Select the presentation.

To upload a presentation during the conference:

1. Click **Share**.
2. Click **Import Presentation**.
3. Follow the prompts to upload the presentation.
4. Use the arrow keys to move through the presentation.

## DTMF Commands for Audio Conference Controls

During an audio conference, the following key commands can be used:

- #0 List available commands
- #1 Mute/unmute your own line during conference
- #2 Host only - mutes/unmutes all lines
- #3 Host only - lists conference participants
- #4 Host only - starts/stops recording
- #5 Host only - locks/unlocks conference
- #99 Host only - ends the audio and web conference