

# ShoreTel Conferencing – Quick Reference Guide

## Conference Types

Conferences can be:

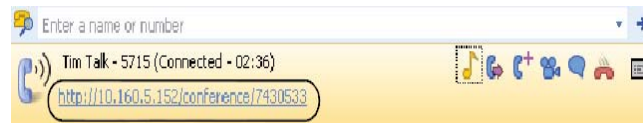
- **Instant:** Spontaneous conference in response to an immediate need, using ShoreTel Communicator.
- **Reservationless:** Conferences that have no fixed time or date.
- **Scheduled:** One time or recurring conference scheduled through Outlook.

## Starting an Instant Conferences

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



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.

## Integrating with Microsoft Outlook

1. Click **Options** and **Preferences** in ShoreTel Communicator.
2. Select **Outlook**.
3. Click **Install** under the Calendar heading.

## Scheduling a Conference Through Outlook

1. Create an appointment or meeting in **Outlook**.
2. Press the **Conference** button and from the drop down menu, select **Create**.

The conference information is displayed, including date, time, duration, link for web conference, and dial in number.

3. Provide the conference details by selecting the **Conference** button and from the drop down menu, selecting **Settings** and **Advanced Options**.
4. Click **Invite Attendees** and enter the attendee email addresses.
5. Click **Send**.

## Creating a Reservation-less Conference

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

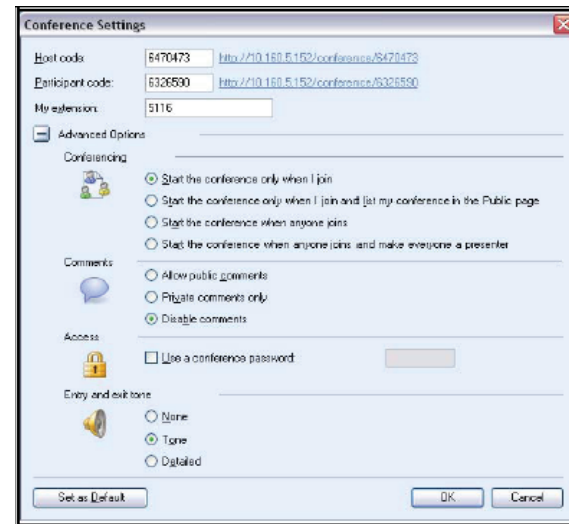
The main conferencing window appears:



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

## Conference Settings and Advanced Options

Conference settings are available 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 or can be customized.
- **Participant Code:** Automatically provided or can be customized.
- **My Extension:** Automatically populated.
- **Advanced Options:**

Conferencing: Determines when the conference is started.

Comments: Determines whether participant comments are allowed and the type.

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

Entry and exit tone: Determines whether a tone is played 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 the Outlook appointment or meeting.
2. Click the **Join Conference** button.
3. The dialing information is populated and allows you to request being called by the Audio Conference service.

From the Conferencing Portal:

1. Login to **My Conferences**.
2. Click the name of the conference.
3. The dialing information is populated and allows you to request being called by the Audio Conference service by entering a phone number.

## Joining a Conference as a Participant

From Outlook:

1. Open the email invite.
2. Click the link in the email to join the conference.
3. The dialing information is populated and allows you to request being called by the Audio Conference service by entering a phone number.

From the Conferencing portal:

1. Click on the web link provided in the Conference email invitation.
2. Click the **Join** icon next to the conference for joining the web portion of the conference and follow directions for joining the audio portion.

## 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** and reply to the confirmation message. 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. Windows presenter tools to manage desktop sharing include:



**Pause:** Pause desktop sharing.



**Show Menu:** Pointer, closing desktop sharing, setting screen resolution.



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



**Stop:** Ends desktop sharing.

## Presenter Control

During a conference, the host can delegate control over presentations to any participant.

1. 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.
5. Click **X** or the **Stop** icon to end presentation sharing.

## 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