Shoreline™

Shoreline Conference Manager User Guide

Conference Bridge Access

Call Manager URL: ______________________

Bridge Extension: ______________________

Bridge Number: ______________________

Introduction

The Shoreline Conference Bridge allows you to schedule and manage conference calls using a web-based interface. This guide describes how to access Shoreline Conference Manager, create calls, join calls, and change your password.

You can use Shoreline Conference Manager to:

- Set up conference calls and receive dial-in numbers and access codes that you can use instantly.
- Upload documents to present to callers during a conference call.
- Add participants to a conference while the call is in progress.
- Drop, mute, and put on hold individual call legs.
- Start a conference call without having to set it up beforehand.
- Record conference calls to play back later.
- Assign a delegate who can create and manage your conference calls for you.
- View reports that summarize your calls over a certain time period.

In addition, some features can be accessed directly from your phone keys. The touch-tone interface allows you to:

- Place outgoing calls and add callers to a conference call that is in progress.
- Hear a list of the names of call participants.
- Hear a count of how many callers are in the conference.
- Listen to recorded conference calls.

This guide is intended to get you started with some of the most basic tasks, including setting up conference calls, joining calls, viewing documents, and adding participants to ongoing calls.

Accessing Shoreline Conference Manager

Shoreline Conference Manager allows you the create conference calls and invite participants. The bridge administrator assigned a URL to the Shoreline Conference Manager in the following format:

https:\\<host name>

If you do not find this URL noted on the cover of this guide, ask the conference bridge administrator. You will also need your email address and password to access the Shoreline Conference Manager.

To access Shoreline Conference Manager:

Step 1 Open your browser.

Step 2 Enter the URL given to you by the conference bridge administrator (see the cover of this guide). The Sign In page appears as shown in Figure 1.

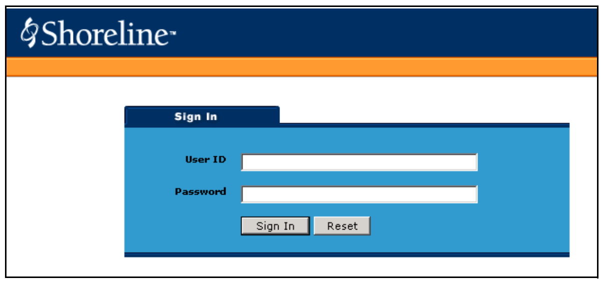


Figure 1 Sign In Page

Step 3 Bookmark this page for easy access later.

Step 4 Enter your User ID (your email address) and your password.

Step 5 Click **Sign In**. The **Home** page appears as shown in Figure 2.

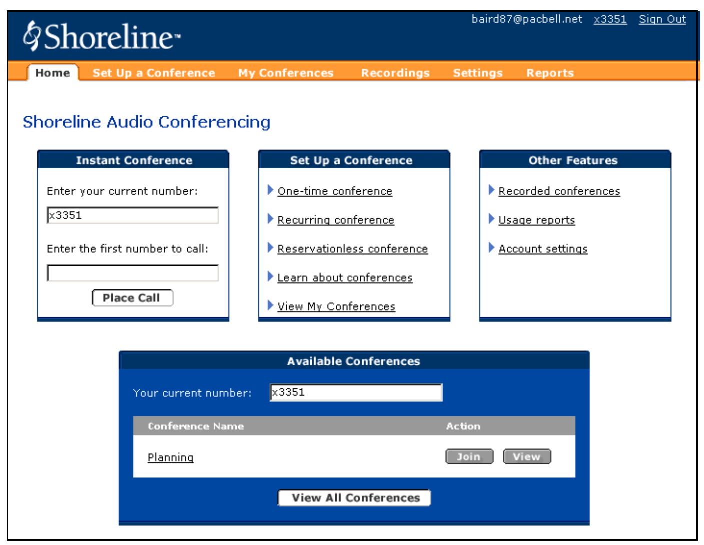


Figure 2 Home Page

Creating a Conference Call

When you create a conference call, you receive both leader and participant access codes. Send the participant code to the conference call participants and keep the leader code for yourself. Unless you request otherwise, a conference call cannot begin until the person with the leader code joins the conference call. The leader code helps prevent fraudulent use of the conference bridge.

To create a conference call:

Step 1 Click the **Set Up a Conference** tab. The **Set Up a Conference** page appears as shown in Figure 3.

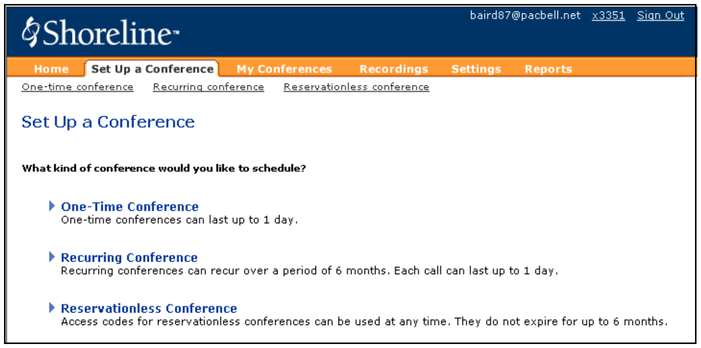


Figure 3 Set Up a Conference Page

Step 2 Select the type of conference you want to set up.

NOTE You must have permission to make reservationless conference calls. For more information, ask your conference bridge administrator.

Step 3 Fill out the conference set up form.

Step 4 Click **Submit**. The **Conference Details** page appears as shown in the example presented in Figure 4.

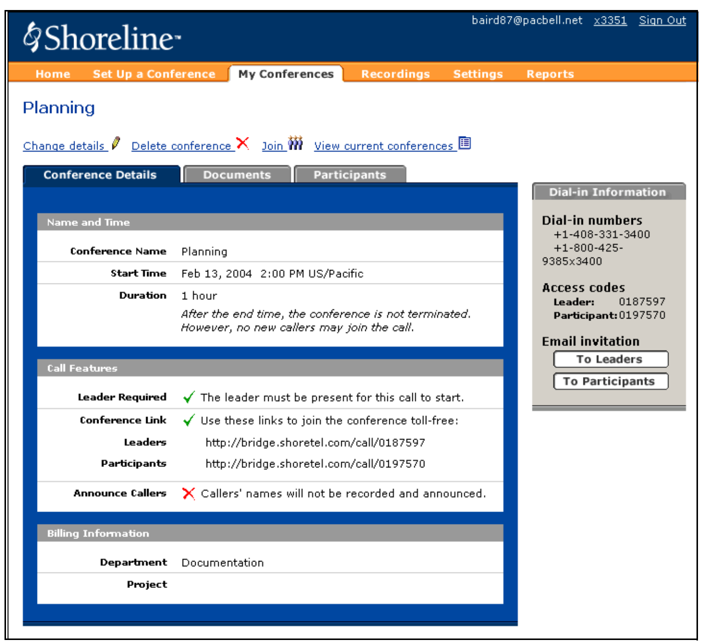


Figure 4 Conference Details Page for Example Call

Step 5 To invite participants to the call, click either **To Leaders** or **To Participants** under **Email Invitation** and add invitees to the send list. The email automatically contains the participant access code, the number to call, and the time of the call.

NOTE The time of the call given in the email is based on the time zone of the conference bridge regardless of where the call was created or the time zones of the call legs.

Joining a Conference Call

You can join a conference call from your phone or, if you created the conference call, you can join the call from Shoreline Conference Manager.

From Your Phone

You can dial into the call using the bridge number or extension, and access code given in the invitation email. After you dial the bridge number, you are prompted for an access code. Enter the access code and follow the voice prompts.

From Shoreline Conference Manager

If you were the person who created the conference call, you can join the call from your Shoreline Conference Manager.

To join a conference you created:

Step 1 Click the **My Conferences** tab.

Step 2 Find the conference that you want to join on the list of conferences.

Step 3 Click **Join** next to the conference that you want (see Figure 2).

Your Current Number (shown in the upper right corner of the screen) will ring. When you answer it, you are transferred into the call.

Add Participants to an Ongoing Conference Call

Call leaders may place outgoing calls during a conference call using a touch-tone interface. In addition, the person who set up a conference may place outgoing calls from his or her web account.

Shoreline Conference Manager

To add a participant from Shoreline Conference Manager:

NOTE You may only dial out from Shoreline Conference Manager for conferences that you set up yourself.

Step 1 Sign in to Shoreline Conference Manager.

Step 2 From **My Conferences**, select the appropriate conference.

Step 3 Click the **Participants** tab.

Step 4 Enter the phone number in the **Dial Out** section at the bottom of the screen.

Step 5 Click **Call**.

Phone Interface

At any time during the call:

- To hear a list of options, press the pound (#) key twice.
- To return to the conference call, press the star (*) key twice.

To dial out using your phone:

Step 1 During the conference call, press the pound (#) key twice.

Step 2 Press 2 to place a call.

Step 3 Enter the phone number, followed by pound (#).

To keep the new call and return to the conference:

Step 1 Press the star (*) key twice.

Step 2 When you hear the voice prompts, press 1 to return to the conference with new call.

To drop the call:

Step 1 Press the star (*) key twice.

Step 2 After you hear the voice prompt, press 2 to drop the call.

View Documents During a Conference Call

When you create a conference call, you can upload Microsoft Word, Excel or PowerPoint® documents to the Shoreline Conference Bridge so that other callers can view them during the call.

- Callers view documents through their web browsers using a URL that you send.
- Callers cannot see documents until you are ready to show them.
- You control the presentation of documents throughout the call.

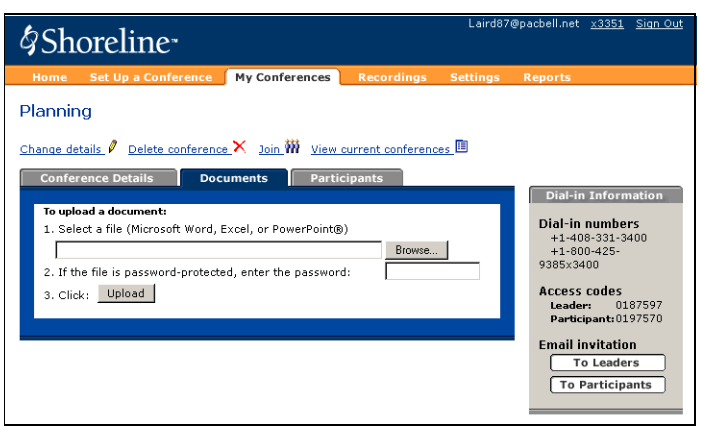


Figure 5 Uploading Documents Page

To upload a document for viewing:

Step 1 From **My Conferences**, select the appropriate conference.

Step 2 Click the **Documents** tab.

Step 3 Use the **Browse** button to select a file from your computer.

Step 4 Click **Upload**.

To send participants a link to the document viewing page:

Step 1 From **My Conferences**, select the appropriate conference.

Step 2 Click the appropriate email invitation button in the gray box on the right side of the screen. The email message that opens will contain a link to a web page where participants can view documents.

To view documents during a conference call:

Step 1 From **My Conferences**, select the appropriate conference.

Step 2 Click the **Documents** tab. Make sure that the status column next to your document name shows that the document is Ready.

Step 3 Click **Start Presentation**.

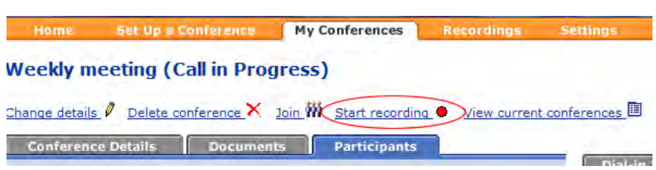
Recording and Playing Back Conference Calls

Recordings are listed by the name of the conference that was recorded, the date, and time the recording was made.

To record a conference call:

Step 1 From **My Conferences**, select the appropriate conference.

Step 2 Click **Start Recording** at the top of the page.



Step 3 When finished, click **Stop Recording**.

To play back to a recorded conference call:

Step 1 Click the **Recordings** tab.

Step 2 Click on the name of the recording. You may listen to the conference using your computer or your telephone.

NOTE If you dial in to the recording, note that the recording access code is different from the original conference access code.

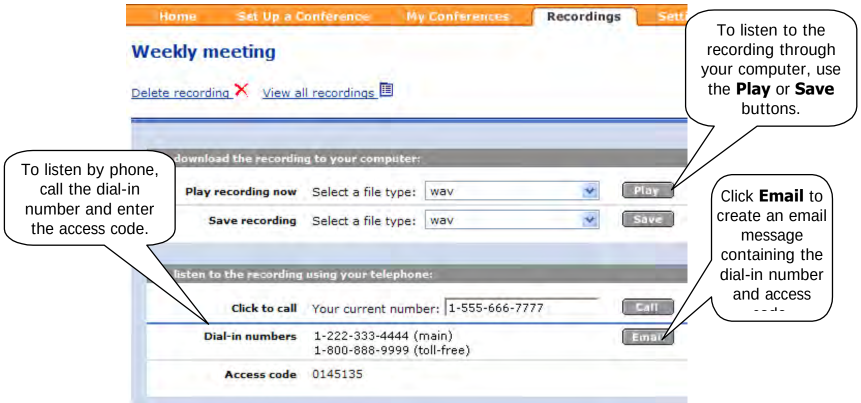


Figure 6 Recordings Tab

To create an email message containing the recording dial-in and access number:

Step 1 From the **Recordings** tab, find the appropriate recording.

Step 2 Click **Email**.

To control playback using your phone keypad:

If you listen to a recorded conference call through your phone, you may use your telephone keypad to pause, back up, and fast forward as shown in Figure 7.

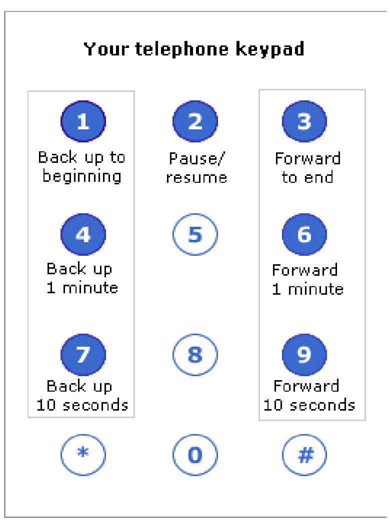


Figure 7 Keypad Recording Play Back Functions

Changing Your Password

You can change your password from the **Settings** tab.

To change your password:

Step 1 Click the **Settings** tab. The **Settings** page appears as shown in Figure 8.

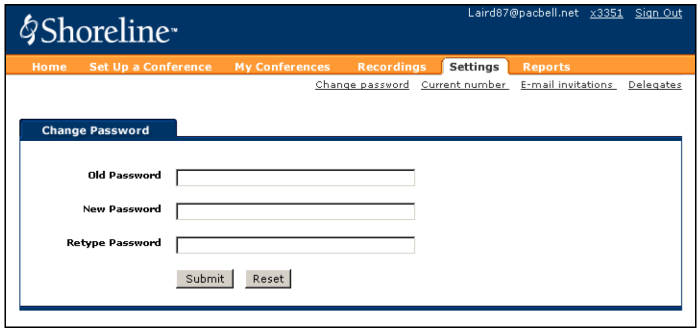


Figure 8 Settings Page

Step 2 Enter your current password and the new password. For accuracy, retype the new password.

Step 3 Click **Submit**.

Assigning a Delegate

You can assign another person the rights to view and manage your conference call schedule.

To assign a delegate:

Step 1 Click the **Settings** tab.

Step 2 Click **Delegates**. The Delegates page appears as shown in Figure 9.

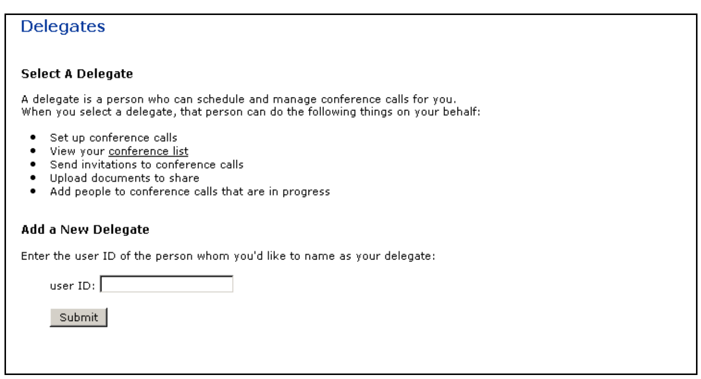


Figure 9 Delegates Page

Step 3 Enter the User ID of the person you want to be your delegate.

Step 4 Click **Submit**.

Viewing Summary Reports

You can view a summary report of your conference calls from the Reports page.

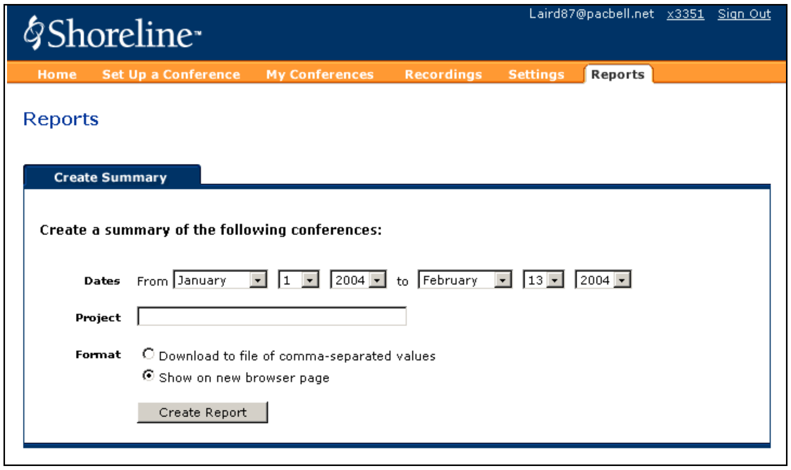


Figure 10 Reports Page

To generate a summary of your conference calls:

Step 1 Click the **Reports** tab.

Step 2 Select the dates you want to include in your report.

Step 3 If you want to filter the summary by project, enter a project code.

Step 4 Select a format for the report.

Step 5 Click **Create Report**.

Using Shoreline Outlook Form

If you have installed the Shoreline Converged Conference Solution Outlook form, you can generate telephone numbers, access codes, and web links you can use for voice conferences and web presentations.

To use the Outlook Form:

Step 1 In your Outlook Calendar, schedule an appointment as you would normally.

Step 2 Click on the Conferencing form tab.

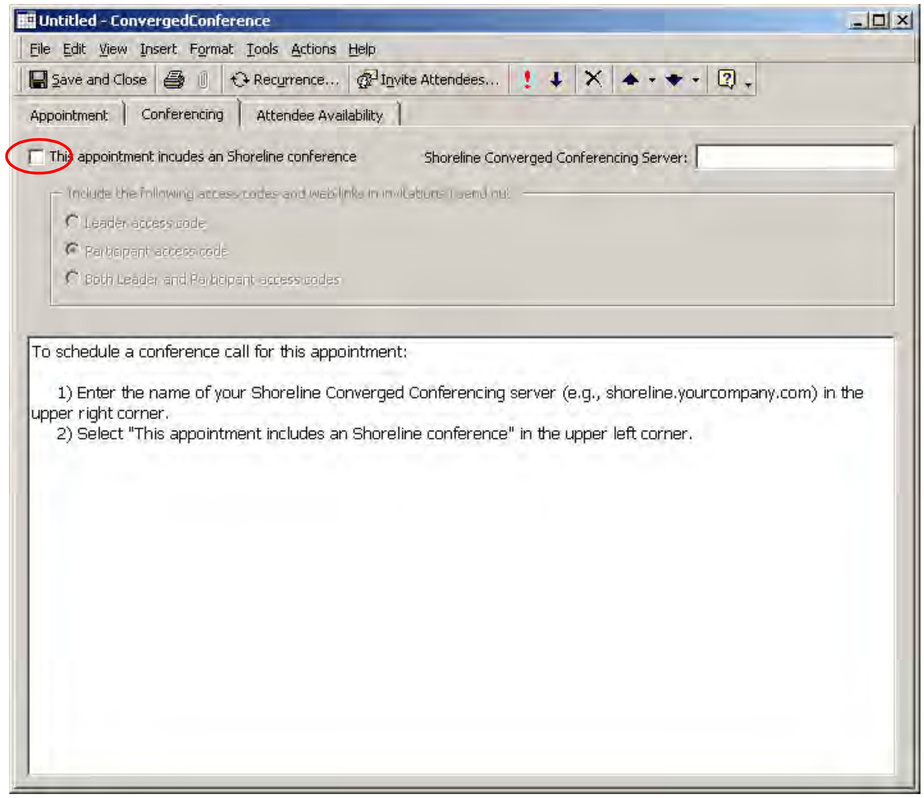


Figure 11 Form Tab

Step 3 The first time you use the form, you need to enter the name of your organization's Shoreline Conference Bridge in the server field. The server name is typically of the format "Shoreline.yourcompany.com." For the correct server name, contact your system administrator.

> **NOTE** You only need to enter the server name once—the form remembers the server name for future use.

Step 4 Click on the check box labeled "This appointment includes a Shoreline conference call."

In the resulting form, you will see the information for this conference:

- Dial in phone number(s)
- Access codes (Leader and Participant)
- Links for web presentations

You can select the following call features for this particular conference:

- Whether the leader is required for the call to start
- Whether participants are asked to record their names before they join the call
- Whether Department and Project codes for cost accounting purposes are requested

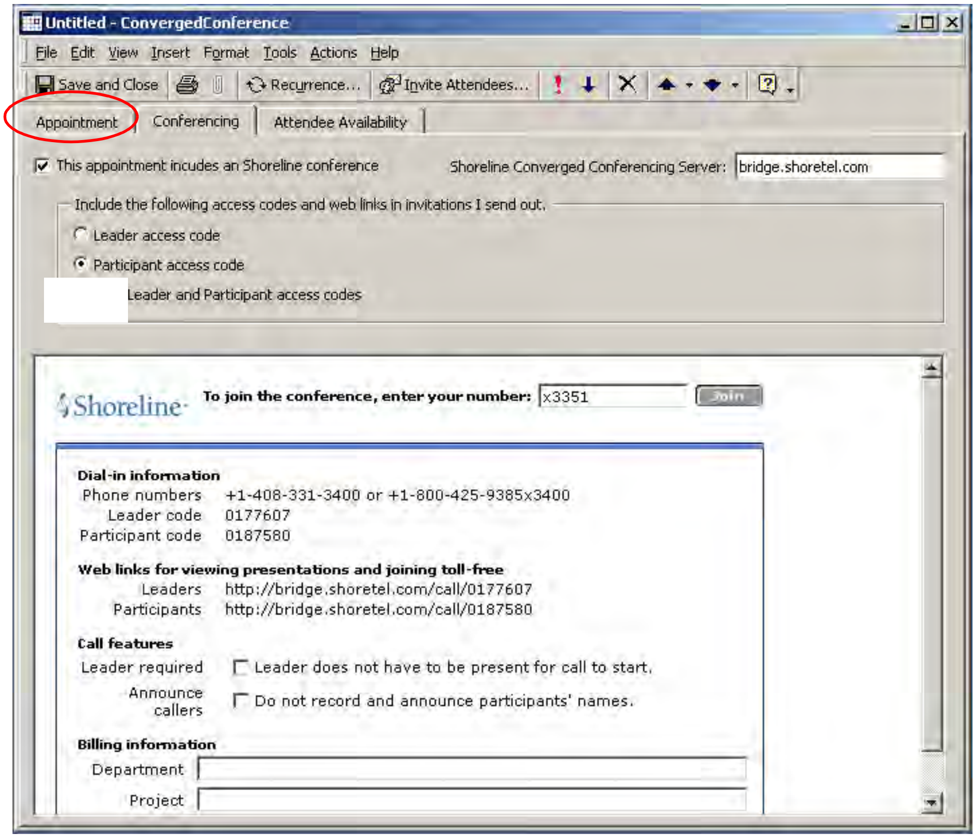


Figure 12 Conference Information Form

Step 5 Once you have selected the conferences options you want, click the **Appointment and Scheduling** tabs and enter the appointment information as you would for any appointment.

Step 6 Select **Save and Close**. The appointment you have just created will have dial-in number and access codes that can be used for an associated conference.