



ShoreTel 13 Conferencing User Guide

Part Number 850-1234-01



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Company Information

ShoreTel, Inc.
960 Stewart Drive
Sunnyvale, California 94085 USA
+1.408.331.3300
+1.408.331.3333 (fax)
www.shoretel.com

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About this Guide

Objectives

- Provide information on using ShoreTel Conferencing.

Audience

- ShoreTel Conferencing users.

Organization

- Separated into major tasks, presented in the order in which they should be completed.

ShoreTel Documentation Overview

- ShoreTel system is documented as described in the following sections.

System Documentation

- *Conferencing User Guide*

Provides information on how to plan the implementation of the ShoreTel Service Appliance 100 (SA-100), as well as how to install the hardware and configure the integrated applications.

- *Planning and Installation Guide*

Provides information on how to plan the implementation of the ShoreTel system, as well as how to install the hardware, data communications, and telecommunications hardware and software.

Software Documentation

- *ShoreTel Administration Guide*

Provides detailed reference information (both task-based and screen-by-screen) on how to administer and maintain the ShoreTel system using ShoreTel Director.

- *ShoreTel Server Software Release Notes*

Provide information about new releases, new features, installation, and upgrading for the ShoreTel server.

Hardware Documentation

- Following installation documents are packaged with the associated ShoreGear voice switch, ShoreTel Service Appliance 100, or ShorePhone IP phone:
 - Quick Install Guides for each ShoreTel Voice Switch
 - ShoreTel Service Appliance 100 Quick Install Guide
 - Quick Install Guide for each ShorePhone IP phone

User Documentation

- End-user documentation is installed during the ShoreTel Communicator installation. It is available through the Help > Contents and Index command in ShoreTel Communicator.

Online Knowledge Base

- To access additional information about the current release or to resolve issues with the ShoreTel system, you can use the ShoreTel online knowledge base.
- This password-protected, online database is accessible to authorized contacts through the ShoreTel web site at www.ShoreTel.com.

Document Conventions

- Conventions used in this guide include the following:
 - Data-entry field names, hypertext links, control buttons, keywords, and other items within the system management interface are in **boldface** text.
 - Information that you enter in data-entry fields is in a `data_entry` font.

C H A P T E R 1

ShoreTel Conference Web: Overview

1.1 Introduction

ShoreTel Conference Web provides an easy-to-use tool for hosting and attending conferences, sharing desktops or applications (including presentations), and recording conferences.

Conferences can be web and audio, web only, or audio only.

ShoreTel Conference Web runs in a standard Web browser and does not require installation of any special software if your computer is running ShoreTel Communicator.

1.2 Hosting a Conference

As a ShoreTel Conference Host, you can:

- Create new conferences and edit and delete existing conferences.
- Lead a conference and give presentation rights.
- Browse a list of conferences and conference owners.
- Manage library content for conferences.
- View details about your conferences.
- Play or download recordings.

1.3 Participating in a Conference

As a ShoreTel Conference participant, you can:

- Access a conference by following instructions on a conference invite.
- Access and view listing of available public conferences.
- View and play available recordings.

1.4 Conference Interface

ShoreTel Conference Web is accessible through three user interfaces: Conference Viewer, Conference Web Portal, and Conference Administration Site.

NOTE ShoreTel Conference Web may also be accessed from Outlook and ShoreTel Communicator for Windows.

1.4.1 Conference Viewer

- Used primarily by hosts to schedule, start, delete conferences and access their recordings.

1.4.2 Conference Web Portal

- Used primarily by hosts to schedule, start, delete conferences and access their recordings.

1.4.3 Conference Administration Site

- Allows an Administrator to configure web site parameters, establish default conference parameters, and also view and generate web conference reports.

1.5 ShoreTel Web Conference Features

Table 1-1 ShoreTel Web Conference Features

Conference Management	Conference Audio	Conference Web
<ul style="list-style-type: none"> • Scheduled, instant, and reservationless conference • Customizable host and participant access codes • Audio and Web conference Recordings/ Playback • Secure Conference Web: Encrypted Web conferences (HTTPS) 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"> • HD audio • Telephone user interface (TUI) with wide number of commands • Call participant • Integrated conference button on ShoreTel IP phone • Resilient Conference Web 	<ul style="list-style-type: none"> • Zero install for participants • Zero install for hosts using ShoreTel Communicator • Application and desktop sharing • Application and desktop sharing recording/playback • Shared and Private library • Whiteboard • File transfer • Conference Chat • Support for Microsoft PowerPoint and any Flash document • Resilient Conference Web

C H A P T E R 2

ShoreTel Conference Web Portal

2.1 Introduction

From the ShoreTel Conference Web Portal, you can create conferences, upload files for use in conferences, create a user profile, and more.

NOTE If you are on a system with Audio Conference licenses only, you cannot upload files.

Depending on the settings of your ShoreTel system, you are presented with one of the following web portals when opening up the ShoreTel Conference Web Portal:

- The ShoreTel conference Web portal for Web and audio:
 - Opened when the system supports both conference Web and conference audio.
- The ShoreTel conference Web portal for audio:
 - Opened when the system supports conference audio only.

2.2 Accessing ShoreTel Conference Web Portal

You can access the ShoreTel Conference Web portal from a Web browser (page 12) or from ShoreTel Communicator (page 15).

Microsoft Internet Explorer 9.0 or later, Firefox 12.0, or Safari 5.0 is required to access the ShoreTel Conference Web Portal from a browser.

If you are logged into ShoreTel Communicator, you can access the ShoreTel conference Web portal by clicking Window->Conference Web Portal.

2.2.1 Accessing Portal from a Web Browser

When accessed from a Web browser, the ShoreTel Conference Web portal opens at the Public page.

From there, you log into the My Conferences page.

To log into My Conferences, you need the following:

- Your ShoreTel user ID.
- Your ShoreTel conference password.

NOTE Ask your ShoreTel system administrator for the password, if you do not know it.

2.2.1.1 Logging into the Web Portal

Step 1 Launch a supported browser.

Step 2 In the Address field, type the URL for the ShoreTel Conference application.

NOTE Ask your ShoreTel system administrator for the URL, if you do not know it.

The ShoreTel conference Web portal is opened to the Public page for systems supporting conference audio and conference Web (Figure 2-1) or for systems supporting conference audio only (Figure 2-2).

Step 3 Click Sign In in the upper right hand corner of the page.

The Sign In page is displayed (Figure 2-3).

Step 4 Enter your ShoreTel user ID.

Step 5 Enter your ShoreTel password.

NOTE The password must consist of standard ASCII characters. Non-ASCII characters are not supported.

Step 6 Click the Sign In button.

The My Conference page is displayed (Figure 2-4).

It is the home page for almost all of your conference activities.

NOTE The first time you sign into the Web portal, you must set the time zone for your conference device (Figure 2-5). Select your local time zone. The system automatically adjusts conference times to your local time.

Figure 2-1 Web Page for Web and Audio

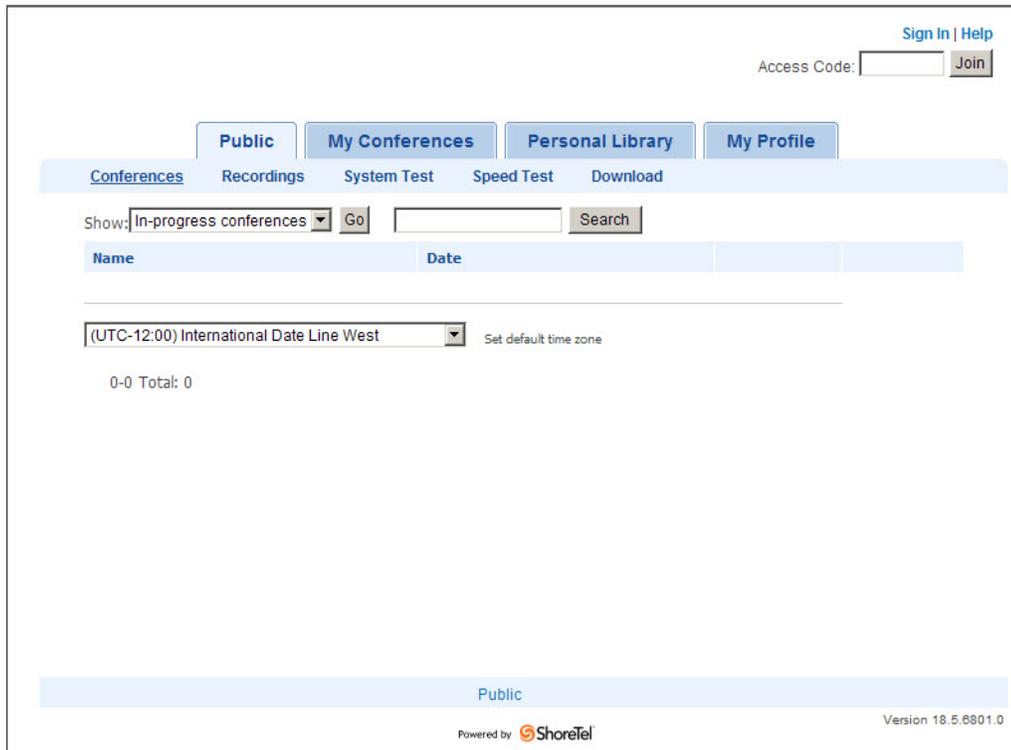


Figure 2-2 Web Page for Audio Only

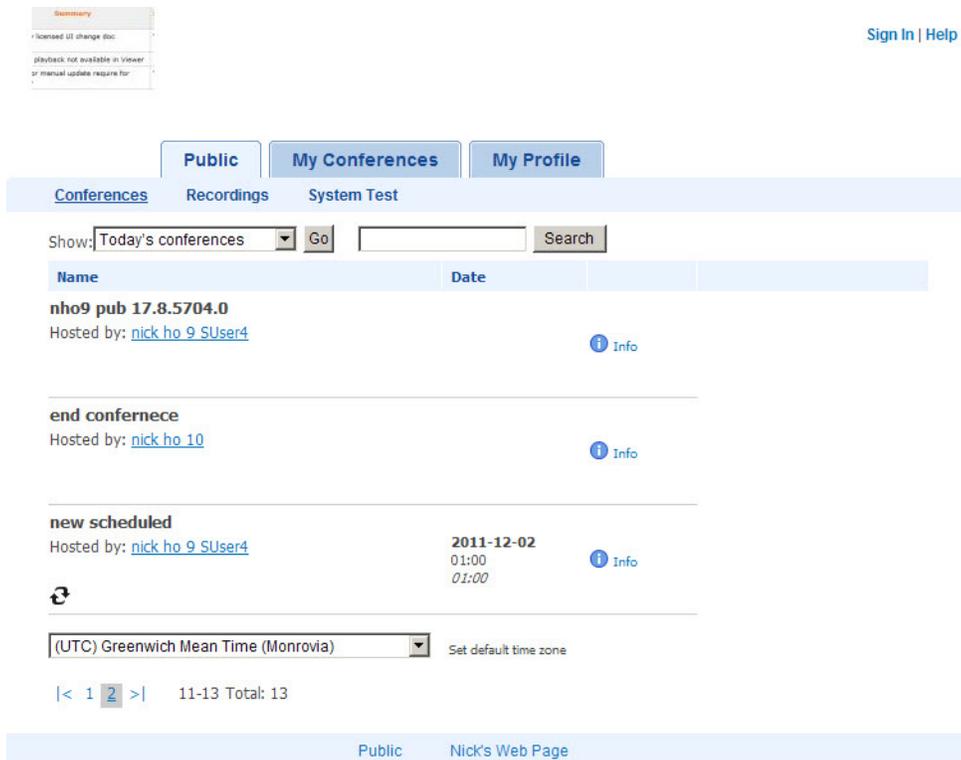


Figure 2-3 Sign In Page



Figure 2-4 My Conferences Page

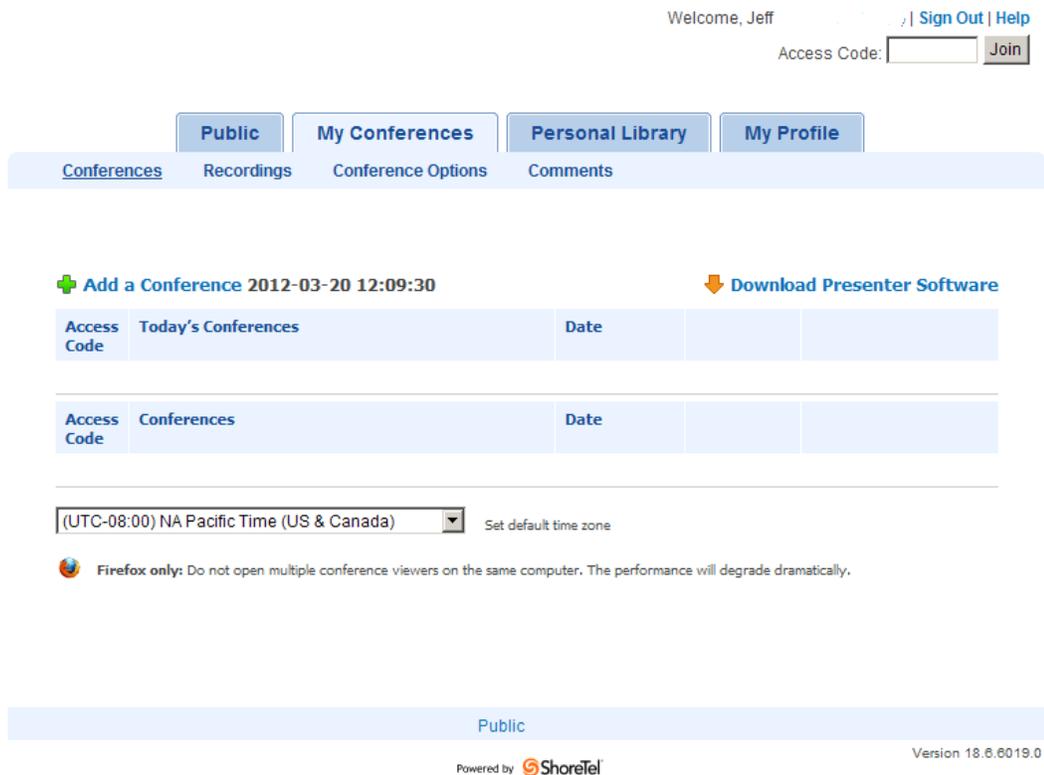


Figure 2-5 Set Time Zone Page

Welcome, Not Set | [Sign Out](#) | [Help](#)
Access Code:

[Public](#) [My Conferences](#) [Personal Library](#) [My Profile](#)

Your time zone has not been set. Once set you will not be prompted again.

[Public](#)

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2.2.2 Accessing Web Portal from ShoreTel Communicator

Step 1 Launch ShoreTel Communicator.

Step 2 Click Windows > Conference Web Portal (Ctrl+Shift+K). (Figure 2-6)

The ShoreTel conference Web site is opened in your default browser.
(Figure 2-7)

Depending on how your system is configured, the audio and Web version of the My Conferences page is displayed, or the audio only version of the My Conferences page is displayed.

NOTE The first time you sign into the Web portal, you must set the time zone for your conference device (Figure 2-5). Select your local time zone. The system automatically adjusts conference times to your local time.

Figure 2-6 Access Conference from Communicator

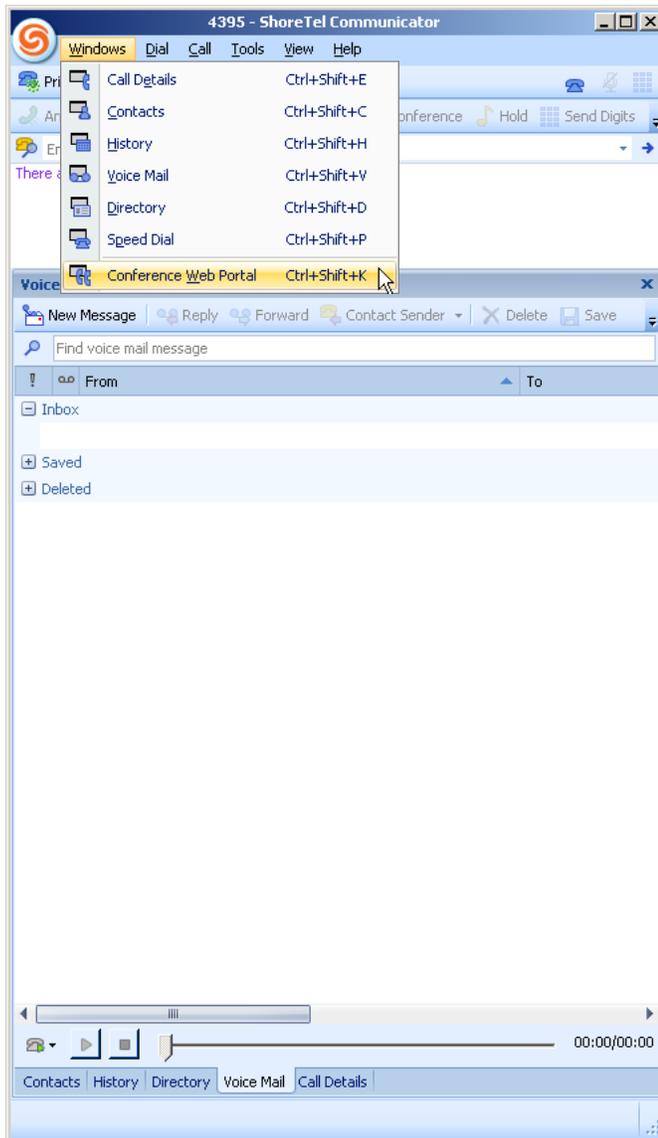


Figure 2-7 My Conferences Page Accessed from Communicator

Welcome, Jeff [Sign Out](#) | [Help](#)
Access Code:

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

[Conferences](#) | [Recordings](#) | [Conference Options](#) | [Comments](#)

[+ Add a Conference](#) 2012-03-20 12:09:30 [Download Presenter Software](#)

Access Code	Today's Conferences	Date		

Access Code	Conferences	Date		

(UTC-08:00) NA Pacific Time (US & Canada)

Firefox only: Do not open multiple conference viewers on the same computer. The performance will degrade dramatically.

Public

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2.3 My Conferences

From here, you can create and manage your conferences.

If you receive a conference invite, follow the instructions in the message to join a conference, which direct you to My Conference.

If you are logged into the Web portal, join a conference via My Conference.

My Conferences includes four pages: "Conferences", "Recordings", "Conference Options", and "Comments".

2.3.1 Conferences

From here, you can create and view conferences (Figure 2-8, Figure 2-9, Table 2-1).

2.3.1.1 Accessing Conferences

Step 1 Click Conferences.

The Conference page is displayed.

NOTE You can also join a conference by entering the access code for the conference in the Access Code field.

Figure 2-8 My Conferences Tab Web and Audio

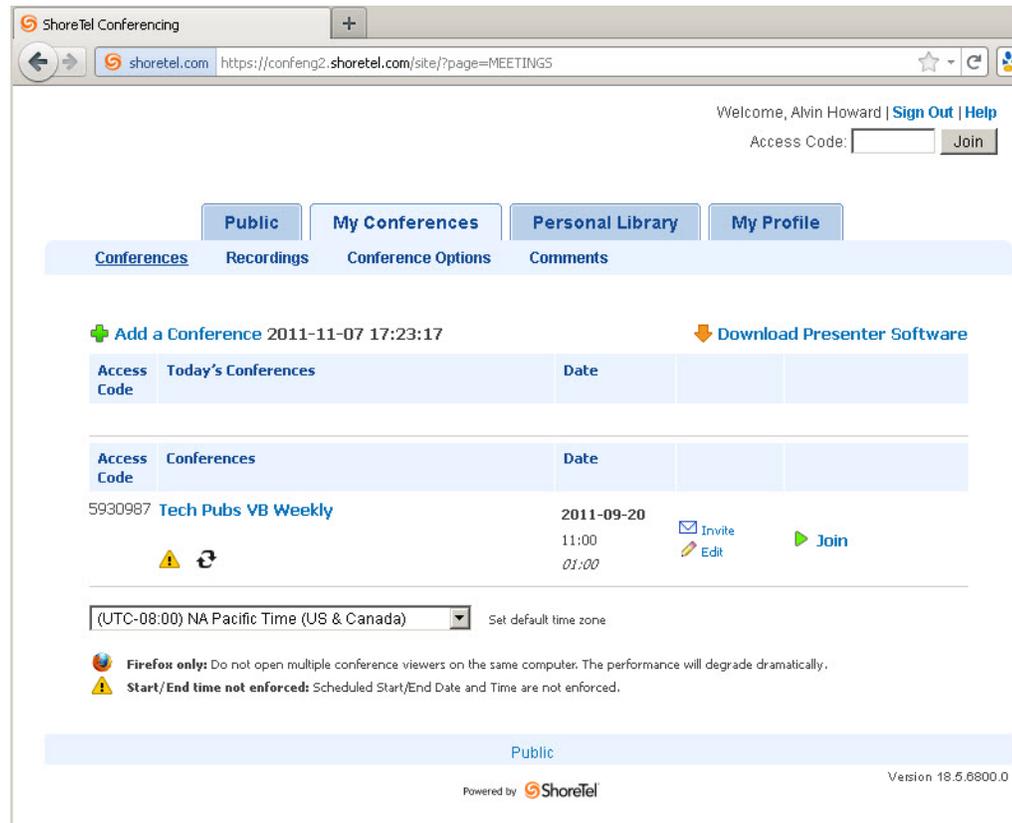


Figure 2-9 My Conferences Tab Audio Only

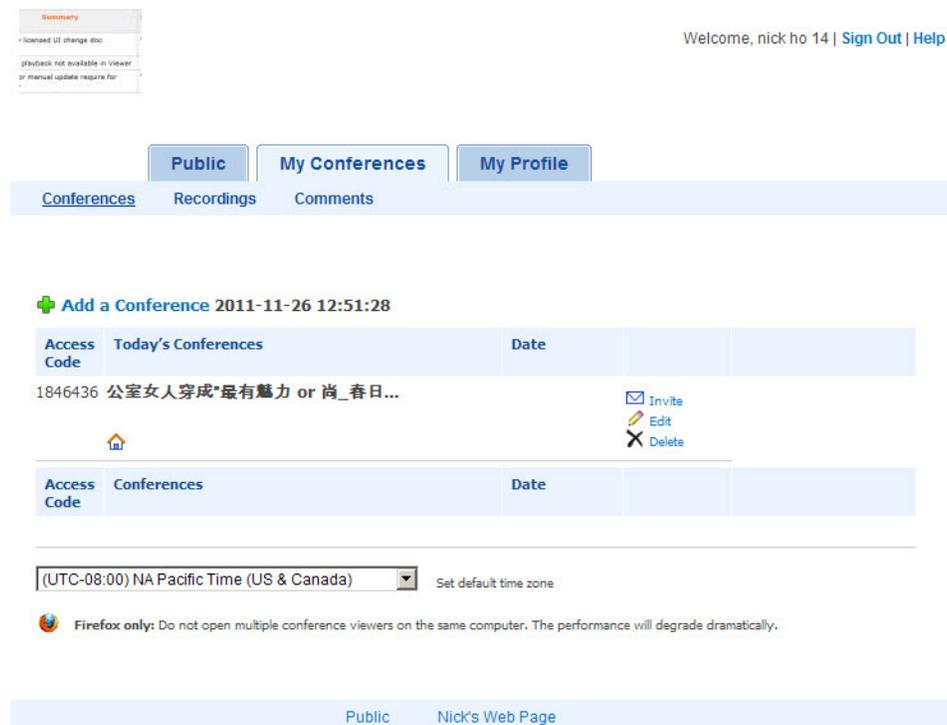


Table 2-1 My Conferences

Add a Conference	Create a new conference. Launches Add a Conference page; from here, you can create one-off conferences and recurring conferences.
Download Presenter Software (Not applicable in audio only Web page)	Download ShoreTel Presenter for Windows. It is optimized for Windows computers. A computer must have a presenter to share data. Java 1.6.0.15 Runtime Environment can also be used to perform presenter functions.
Access Code	Lists numbers used by the system to identify conferences. The system automatically generates an access code for each new conference (which can be edited). This number is used by participants to join the conference.
Today's Conference	Lists conferences scheduled for today.
Conferences	Lists conferences scheduled for days after today.
Date	Date of scheduled conference, including date for recurring conferences.
Invite	Access e-mail message automatically sent by the system to specified conference participants.
Edit	Modify conference parameters. Only conferences created in the ShoreTel conference Web portal can be modified. Conferences created in Microsoft Outlook or another calendar can be modified only in those applications
Join	Join a conference.
Set default time zone	Specify your local time zone. All conference information is adjusted to your local time, including conferences schedule in different time zones.
	Warning. Read associated message.
	Recurring conference.

2.3.2 Recordings

From here, you can view, play, download, edit, and delete conference recordings. You can also invite conference participants to listen to and view recordings.

2.3.2.1 View Recordings

Step 1 Click Recordings.

The Recordings page is displayed (Figure 2-10, Figure 2-11, Table 2-2).

The recordings made by you are listed.

NOTE Recordings made during a conference are automatically added to the recordings list.

Figure 2-10 Recordings Web and Audio

Welcome, Alvin Howard | [Sign Out](#) | [Help](#)
 Access Code:

[Public](#) [My Conferences](#) [Personal Library](#) [My Profile](#)

[Conferences](#) [Recordings](#) [Conference Options](#) [Comments](#)

Show:

Move selections to: :

	Recording ID	Name	Date		
<input type="checkbox"/>	2422766	Other JT 	2012-01-24 14:43 00:01:53	 Invite  Edit  Delete	 Play  Download (web & audio)  Download (audio only)
<input type="checkbox"/>	1343385	Other JT	2012-01-24 10:49 00:02:10	 Invite  Edit  Delete	 Play  Download
<input type="checkbox"/>	2864913	Other JT	2012-01-24 10:46 00:01:10	 Invite  Edit  Delete	 Play  Download

Public

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Figure 2-11 Recordings Audio Only

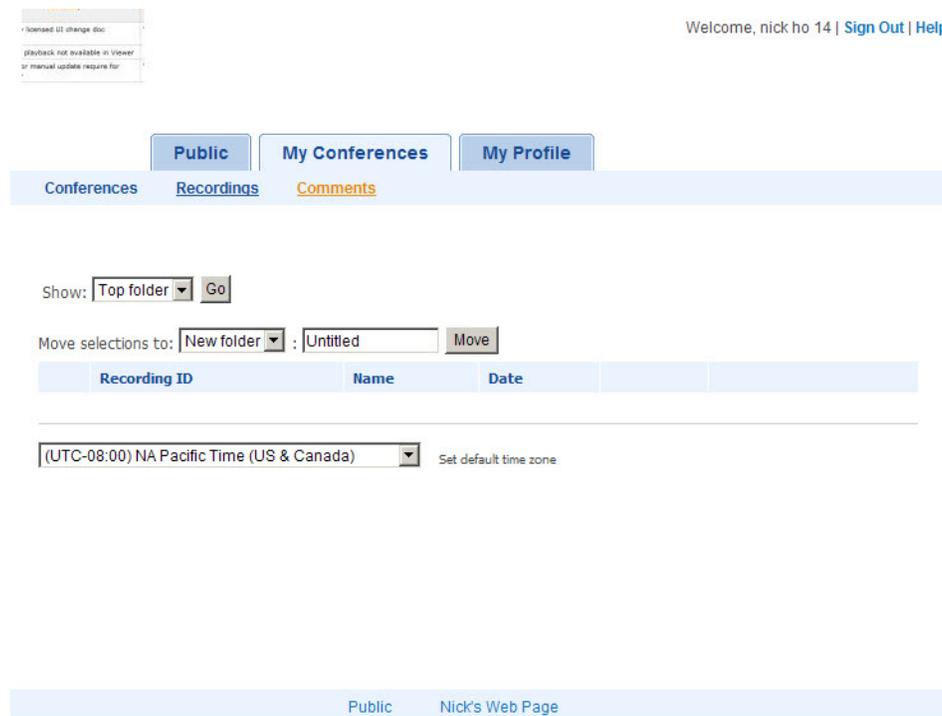


Table 2-2 Recordings

Show	Display name and location of recordings.
Go	Display contents of selected folder.
Rename folder to	Rename recording folder.
Rename	Rename recording file.
Delete	Delete file.
Move selection	Move selected folder from one location to another.
Move	Transfer recordings to selected folder.
Recording ID	Automatically assigned to recording session. Multiple recordings can be made in a conference.
Name	Conference name.
Date	Date and time recording was made, and duration.
Invite	Send recordings as e-mail attachments.
Edit	Edit recordings.
Play	Play recordings.
Download (web & audio)	Download web and audio recordings.
Download (audio only)	Download audio recordings.
Set default time zone	Specify your local time zone. All conference information is adjusted to this setting.

2.3.2.2 Access Recordings

Step 1 From Show, select a recording.

Step 2 Click Go.

The recording is displayed.

2.3.2.3 Play Recordings

Step 1 Click Play.

The what is opened (Figure 2-15).

Step 2 Click the buttons to control playback.

Figure 2-12 Recording Tools Dashboard



2.3.2.4 Download Recordings

Step 1 Click Download and follow the prompts.

2.3.2.5 Invite Someone to Listen to or View Recordings

Step 1 Click Invite and follow the prompts.

2.3.2.6 Edit Recordings

Step 1 Select a recording.

Step 2 Click Edit.

The Update Recording page is displayed (Figure 2-13).

Step 3 Specify Login options.

Step 4 Click Show more options.

The Publish and Comments options are displayed (Figure 2-14).

Step 5 Specify publishing and comments options.

Step 6 Click Submit.

The options are saved.

Figure 2-13 View Recording Page

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**

Figure 2-14 Show More Options Section of View Recording Page

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.

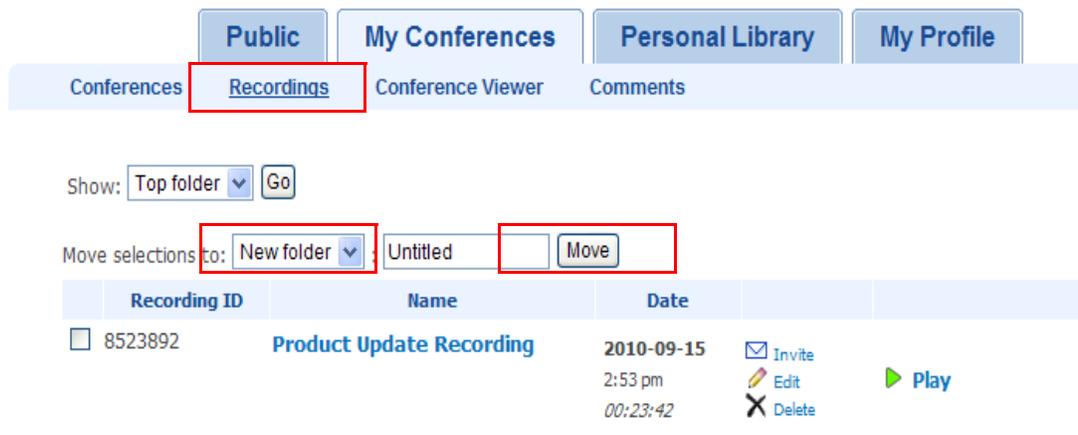
2.3.2.7 Delete Recordings

- Step 1 Select a recording.
- Step 2 Click Delete and follow the prompts.

2.3.2.8 Move Recordings from One Location to Another

- Step 1 Select a recording (Figure 2-15).
 - Step 2 Click Move selection to.
 - Step 3 Select a folder in the drop down menu, or type the folder name in the Untitled field.
 - Step 4 Click Move.
- The recording is moved to the new folder.

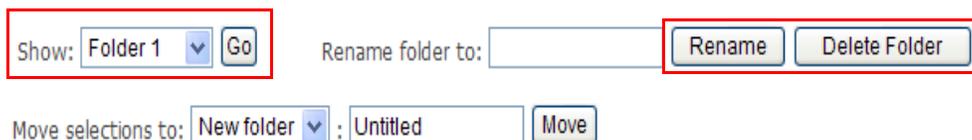
Figure 2-15 Recordings Page



2.3.2.9 Rename Recordings

- Step 1 From Show, select a folder.
 - Step 2 Type a new name in Rename folder to (Figure 2-16).
 - Step 3 Click Rename.
- Folder is renamed.

Figure 2-16 Show Field in Recording Page



2.3.3 Conference Options

From here, you can affix a logo to your conference pages and set parameters that affect user participation (Figure 2-17, Table 2-3).

Figure 2-17 Conference Options

Table 2-3 Conference Options

Logo	Select a logo for display on conference title bar. Acceptable file formats: .jpeg, .gif, or .png files.
Reset to default	
Participant	Participant options: <ul style="list-style-type: none"> • Participants can see everyone’s name. • Participants can send messages to everyone. • Participants can only send messages to the host. • Participants can only see the host’s name.
Alert Sound	Tone signaling that a participant has joined or left conference.
Exit Page	Website browser goes to when participant leaves conference. Enter link to site. Default Website is set by your ShoreTel system administrator.
Submit	Implement and save your changes.

2.3.4 Comments

From here, you can make comments public or private, or you can delete them (Figure 2-18, Table 2-4, Figure 2-19).

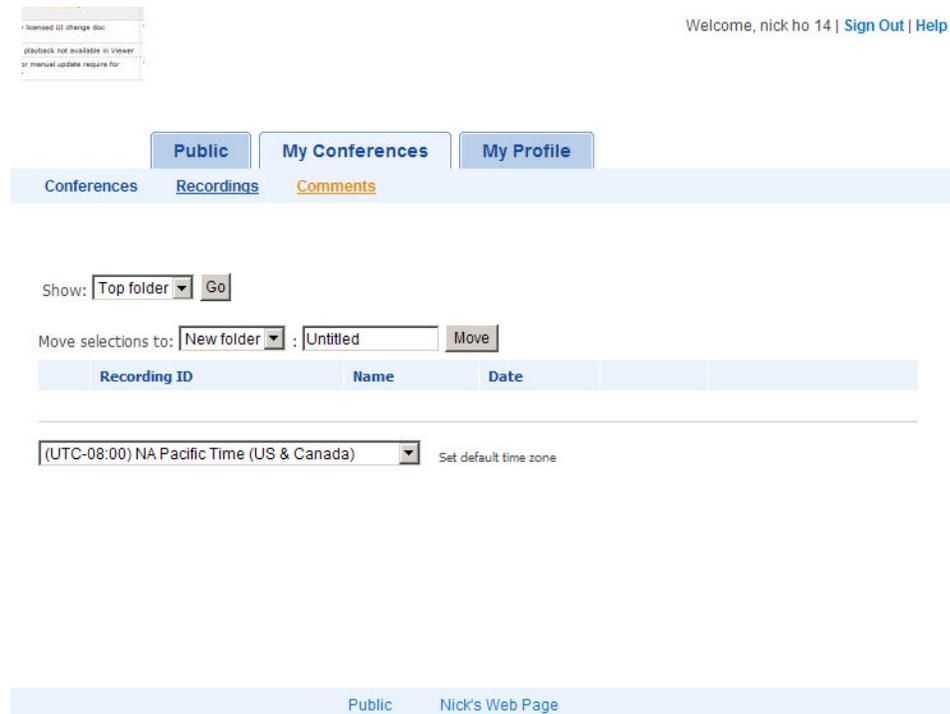
Figure 2-18 Comments Web and Audio



Table 2-4 Comments

1	Conference	Select conference. All comments are displayed.
2	Make Public	Make selected comments available to all viewers.
3	Make Private	Make selected comments available to specific viewers.
4	Delete	Remove comment.
5	Entry Check Box	Enable comment entry.
6	Name of Commentator	Commentator name.
7	Date and Time	Date and time comment was sent.
8	Name of Conference	Conference name.
9	Disposition	Disposition of comment.
10	Comment	Entire posted comment.
11	Count	Number of comments listed on current page.

Figure 2-19 Comments Audio Only



2.4 Personal Library

From here, you can manage files that can be shared in conferences (Figure 2-20, Table 2-5).

You can add presentations, pictures, audio, and video to your personal (private) or shared (public) library.

You can also delete files from the libraries and edit the attributes of the files in the libraries.

Importable file formats include:

- .ppt (PowerPoint)
- .jpeg (photo)
- .flv (Adobe Flash video)
- .mp3 (audio)

Figure 2-20 Personal Library



Table 2-5 Personal Library

Fit Window	Expand library file section into browser.
Restore Window	Revert expanded library view to default library view.
Refresh library	Reload library.
Add	Add new file to library folder.
Delete	Delete a file from library folder.
Edit	Add information to file label.
Personal Library Folder	Personal (private) folder.
Shared Library Folder	Shared (public) folder.
View Panel	Viewing area.
Use Presenter Window client	Download presenter software for your computer.
Public	Open Public tab of ShoreTel conference Web portal.

2.4.1 Add Media to Personal or Shared Library

Step 1 Double-click Personal Library or Shared Library.

Library is highlighted and opened.

Step 2 Click/select a destination folder (pictures, presentations, video files, audio files).

Step 3 Click Add.

The Add to library: Personal Library window is opened (Figure 2-21).

Step 4 Select a Media group.

Step 5 Browse to, select, and open the media.

Step 6 In the Add to library: Media Library window, click File Attributes.

The File Attributes window is opened (Figure 2-22).

Step 7 Enter the attributes.

Step 8 Click OK.

The media is uploaded.

Files cannot exceed 12 MB.

Upload time cannot exceed 10 minutes.

NOTE To import .PPT, ShoreTel Presenter for Windows and MS PowerPoint must be installed on your local PC.

Figure 2-21 Select File Window

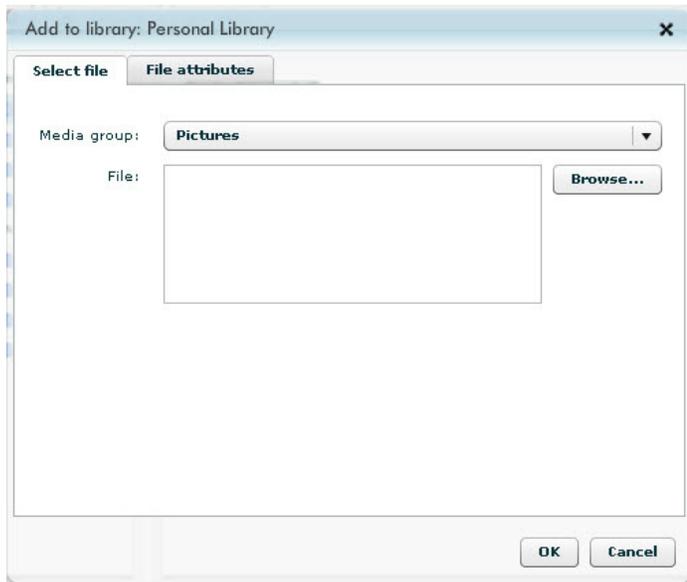
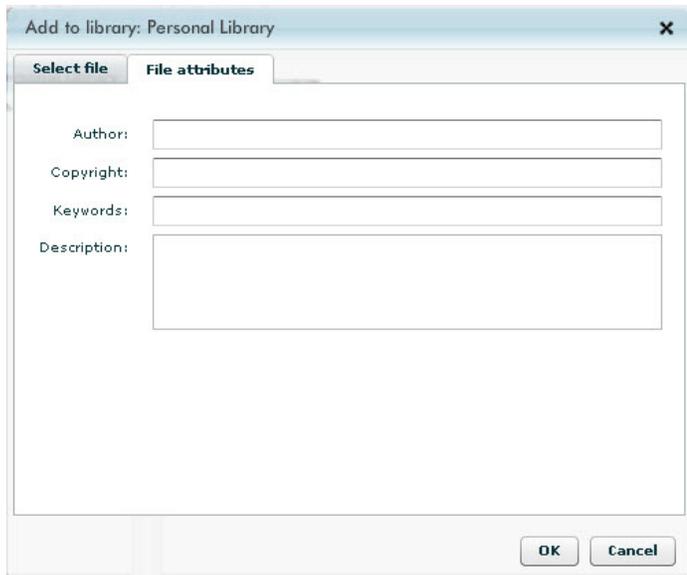


Figure 2-22 File Attributes Window



2.4.2 Delete Media from Personal or Shared Library

Step 1 Double-click Personal Library or Shared Library.

Library is highlighted and opened.

Step 2 Click/select a destination folder (pictures, presentations, video files, audio files).

Step 3 Click/select a file.

The Delete and Edit buttons are activated (Figure 2-23).

Step 4 Click Delete.

The Deleting dialog is opened.

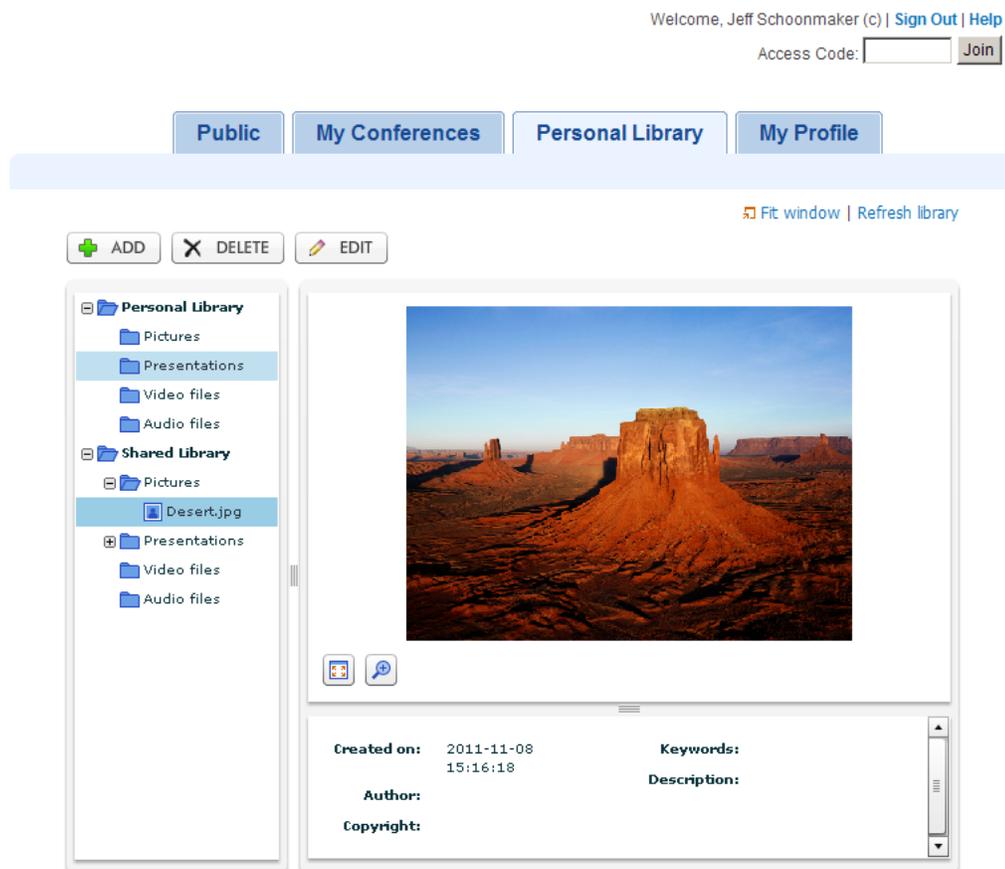
You are prompted to delete the file.

Step 5 Click Yes.

The media is deleted.

NOTE Personal Library files can be deleted only by the owner of the media.
Shared Library files can be deleted by anyone.

Figure 2-23 Delete and Edit Buttons Activated



- **Import Pictures:** Pictures must be .jpg files. Recommend no more than 200KB per picture.
- **Import Presentations:** You have multiple ways to import a presentation:

2.4.3 Edit Attributes of Files in Personal or Shared Library

Step 1 Double-click Personal Library or Shared Library.

Library is highlighted and opened.

Step 2 Click/select a destination folder (pictures, presentations, video files, audio files).

Step 3 Click/select a file.

The Delete and Edit buttons are activated (Figure 2-24).

Step 4 Click Edit.

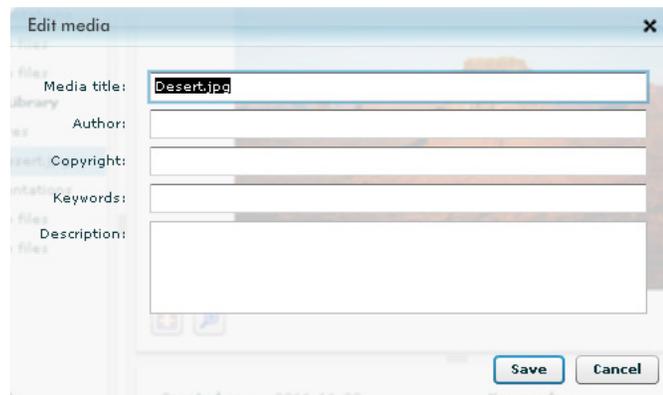
The Edit Media window is opened.

Step 5 Enter edits.

Step 6 Click Save.

The edits are incorporated.

Figure 2-24 Edit Media Window



2.5 My Profile

From here, you can upload a picture for your conference host profile.

The picture is displayed in the Public Conferences tab for conferences hosted by you.

The picture is also displayed under Information in the Conference Viewer.

Importable file formats include:

- .jpg
- .gif
- .png

2.5.1 Access and Upload Pictures

Step 1 Click Browse (Figure 2-25).

Step 2 Navigate to a picture file.

Step 3 Click Save.

The picture is displayed in your conference in the upper-right Info panel.

2.5.2 Remove or Replace Pictures

Step 1 Click Browse (Figure 2-25).

Step 2 Navigate to a picture file.

Step 3 Click Save.

The picture is replaced.

NOTE To do what, check Reset Picture.

Figure 2-25 My Profile Tab



The screenshot shows a user profile interface for "Bill Smith". On the left is a blue placeholder icon for a profile picture. To the right of the icon is the name "Bill Smith" in bold. Below the name is the email address "BSmith@changeme.com". There is a text input field for the profile picture, followed by a "Browse..." button. Below the input field, there is a message: "Select a file to upload. (jpg, gif, png) Max. size: 1280x1024 Image will be resized to 96x96 pixels". Below this message is a checkbox labeled "Reset picture". At the bottom of the form is a "Save" button.

2.6 Using Conference Web Portal

Public is the home page of the ShoreTel Conference Web portal.

Public is available to all users.

Use Public to join a conference if you do not receive a conference invite or if you are not logged into the Web portal.

NOTE If you receive a conference invite, follow the instructions in the message to join a conference, which direct you to the My Conference (page 18). If you are logged into the Web portal, join a conference via the My Conference (page 18).

Public features five pages (Figure 2-26, Table 2-6): "Conferences Page", "Recordings Page", "System Test Page", "Speed Test Page", "Download Page".

From Public, you can perform the following tasks:

- List conferences available for public access.
- List conference recordings available for public access.
- Verify your computer is set up to use conference Web.
- Verify your computer network connection is adequate for conference Web.
- Download and install ShoreTel presentation tools required to use conference Web.

Figure 2-26 Public Tab

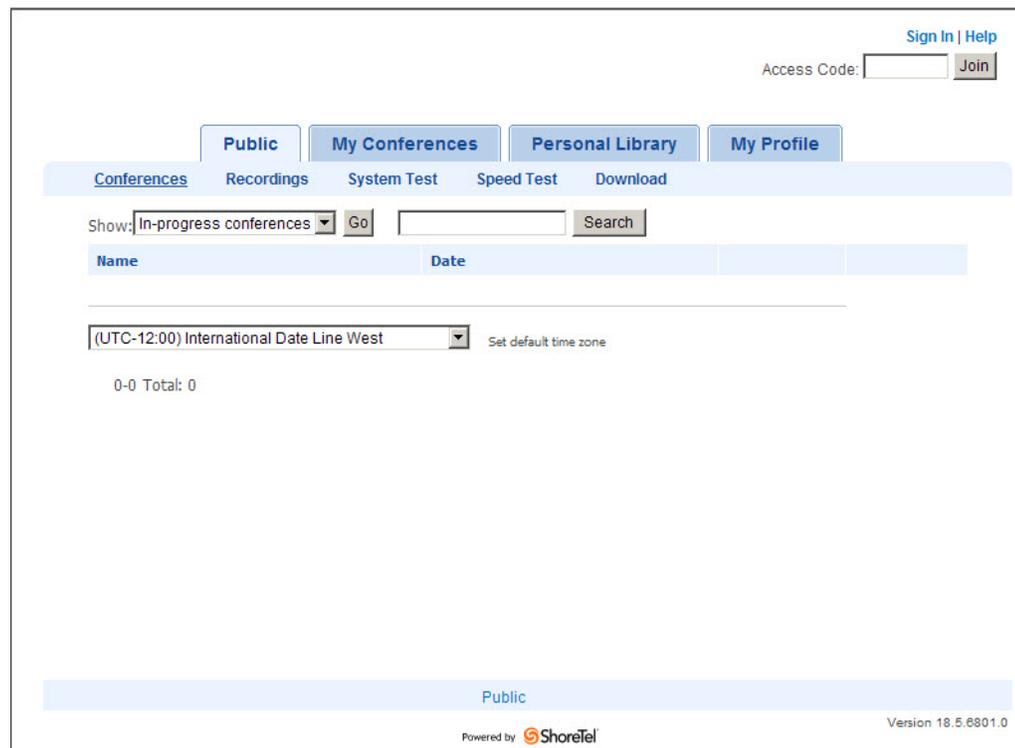


Table 2-6 Public Page

Sign In	Log into your personal Web conference portal.
Help	Launch online help.
Access Code	Conference access code. Enter code, then click Join.
Conferences	Display Public conferences page, which lists conferences available to all users.
Recordings	Display conference recordings available to public. Conference recordings can be downloaded for later listening.
System Test	Test if computer is set up to support Web conferencing.
Speed Test	Test speed of network connection between your computer and appliance set up to support Web conferencing.
Download	Display Download page, which includes links to applications that can be installed to facilitate Web conference presentations.

2.6.1 Conferences Page

From here, you can view a list of conferences, join a conference, or post a comment (for conferences accepting comments). (Figure 2-27, Table 2-7)

Figure 2-27 Public Conferences

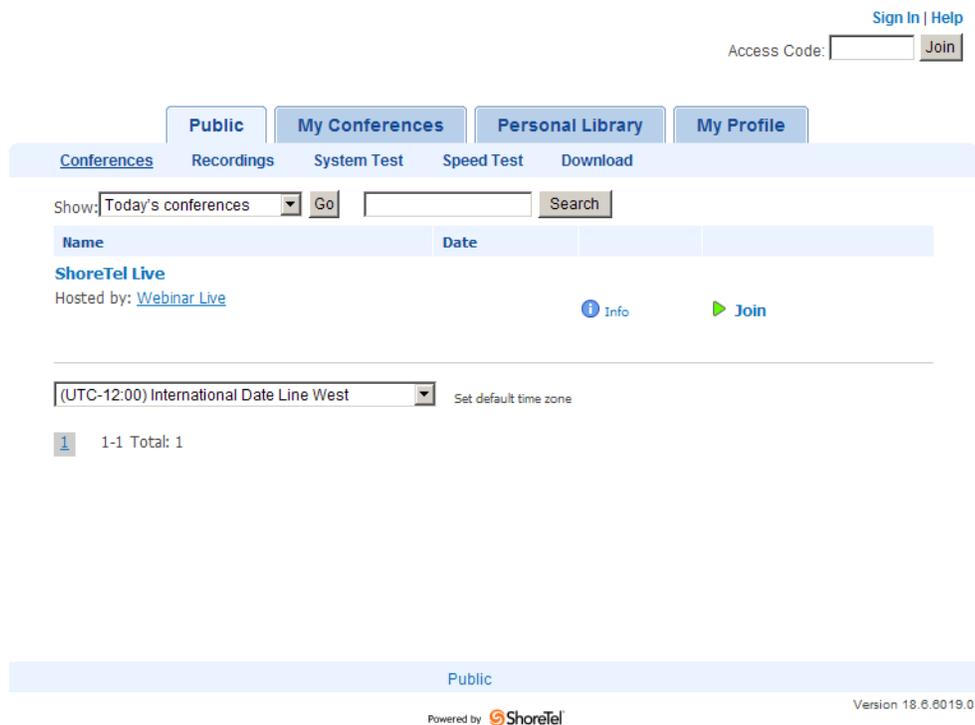


Table 2-7 Public Conferences

Show	Set search criteria for conferences. <ul style="list-style-type: none"> • Today’s conferences. • In-progress conferences. • All conferences.
Go	List conferences specified by criteria in how field.
Search	Search public conference database by conference name, host name, and access code.
Name	Conference name. Conference host is also listed.
Date	For scheduled conferences only: Display conference start date, meeting time, and meeting duration.
Info	Display conference information, including off-system dial-in number, participant code, and public comments. Comments can also be posted here (if a conference is configured to accept comments).
Join	Join (or initiate) a conference.

2.6.1.1 List Conferences

Step 1 In the Show field, select a search parameter.

Step 2 Click Go.

The results are displayed.

NOTE You can also list conferences using the Search field: Enter the name or part of the name of a conference or host (or a conference access code), then click Search.

2.6.1.2 Join a Conference

Step 1 Click a conference name, or click Join.

For more information about joining a conference, see page 57.

2.6.1.3 View Information about a Conference

Step 1 Click Info.

A page containing information about a conference (including comments posted to the conference Web site) is displayed (Figure 2-28 and Table 2-8).

Figure 2-28 Conference Info Page

Sign In | Help

Access Code:

Public My Conferences Personal Library My Profile

Conferences Recordings System Test Speed Test Download

ShoreTel Live

Hosted by: Webinar Live

Join

Login: Participants need to enter a name.

Telephone: +1 (888) 418-8950 Participant code: 7467548

Additional Calling Information:
 ANZ dial in +61 2 99598008
 Singapore dial in +65 6517 0808
 UK dial in +44 1628 826380
 Local dial in +1 (408) 962-2521
 US Toll Free dial in +1 (888) 418-8950

Comments

Public

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Table 2-8 Conference Info

<i>Name</i>	Conference name.
Hosted by	Conference host.
Join	Join conference.
Login	Log into conference.
Telephone	Number needed to dial into a conference.
Comments	Comments made by conference participants (if enabled).
Post a comment	Leave a comment. Link not displayed if Comment is disabled.

2.6.1.4 Post a Comment (if enabled)

Step 1 Enter a conference.

Step 2 Click Post a comment.

The Comments pane is displayed.

Step 3 In the Comments field, type your comment.

Step 4 In the Name field, type your name. (This field is required.)

Step 5 In the Email field, enter the email address to which you want responses sent.

Step 6 In the Security question field, add the numbers and enter the answer in the field.

Step 7 Click Preview.

Your comment is presented as it will be displayed.

Step 8 To remove your comment, click Discard.

The comment is discarded and the Comments pane is closed.

Step 9 To post your comment, click Post comment to public area.

The comment is posted on the conference page.

NOTE You can send a private comment to the conference host by clicking Send private comment to host.

2.6.1.5 Set Time Zone (if not already set)

Step 1 In Set default time zone, select the time zone for your location (Figure 2-5).

The Web page is refreshed, and your computer is set to the time zone in which it is located, ensuring that conference events reported on the computer are adjusted to local time. The default time zone is UTC 12:00.

NOTE You have to set the time zone only once for your computer. The setting is common to all ShoreTel conference Web portal tabs and pages on your computer.

2.6.2 Recordings Page

From here, you can view, play, download, and manage recordings (Figure 2-29, Table 2-9).

Figure 2-29 Recordings

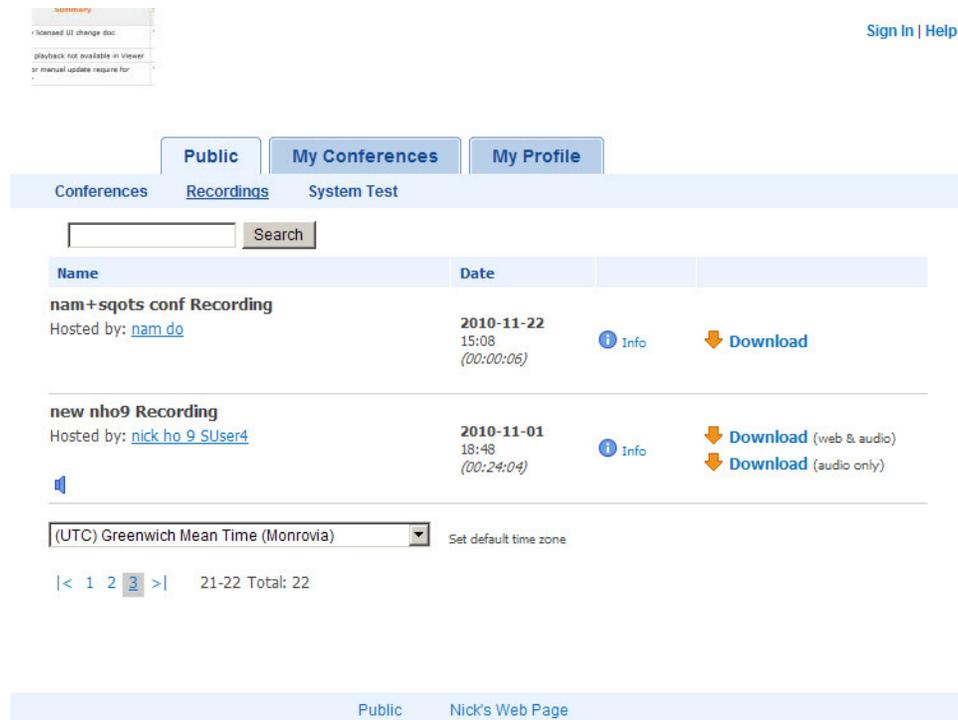


Table 2-9 Recordings

Search	Enter string. Click to initiate search.
Name	Conference name.
Date	Date and time recording started, and duration.
Hosted by	Conference host.
Info	Opens page that provides information about conference.
Play	Play recording.
Download (web & audio)	Download data and audio.
Download (audio only)	Download audio.
Set default time zone	Specify local time zone. All conference information is adjusted.

2.6.3 System Test Page

From here, you can test your computer to ensure that it can run ShoreTel Web conferences (Figure 2-30).

Figure 2-30 System Test Page

Sign In | Help

Access Code:

Public My Conferences Personal Library My Profile

Conferences Recordings System Test Speed Test Download

Component	Check
Operating System Detected: Microsoft Windows	Success
Web Browser Detected: Internet Explorer 7 Required: Internet Explorer 8, Firefox 3.6, Safari 4. *If you are using Internet Explorer 8 or better, make sure 'Compatibility View' is disabled.	Fail
Browser Cookies Detected: Cookies are enabled.	Success
Adobe Flash Detected: Adobe Flash 9 or greater	Success
Presenter Software	Check
ShoreTel Presenter Click the 'Validate' button to the right. It should prompt a 'ShoreTel Presenter Info' dialog, containing the version information. Verify the version is at least 17.1.0.0. If the button press creates an error, or no action at all, ShoreTel Presenter is most likely not installed.	<input type="button" value="Validate"/>

Public

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2.6.4 Speed Test Page

From here, you can test the latency of the connection between your computer and the ShoreTel system (Figure 2-31).

NOTE For best results, the latency should be under 100ms.

2.6.4.1 Test Connection between Your Computer and ShoreTel System

Step 1 Click Speed Test.

The Speed Test page is displayed (Figure 2-31).

Step 2 Click Start Test.

The test is run and the results are displayed.

Figure 2-31 Speed Test

Sign In | Help

Access Code:

Public My Conferences Personal Library My Profile

Conferences Recordings System Test **Speed Test** Download

Speed Tester

Test completed.

	Speed	Latency
Computer Download	80298 kbps	-- ms
Computer Upload	37878 kbps	79 ms

Your Computer  Hosting Server

Public

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2.6.5 Download Page

From here, you can download and install the ShoreTel Presenter software required for using desktop sharing and for importing PowerPoint presentations during conferences (Figure 2-32).

Two versions of ShoreTel Presenter are available:

- ShoreTel Presenter for Windows
 - Enables desktop sharing for Windows users.
 - Allows import of PowerPoint presentations.
 - Installation required.
 - Recommended but Optional: Windows Desktop Accelerator (improves desktop sharing performance).
- ShoreTel Presenter for Java
 - Enables desktop sharing for all users.
 - No installation required.
 - PowerPoint presentation import is not supported.

NOTE PowerPoint can be used to export presentation as series of JPEG images. Or, third-party program can be used to export presentation as Flash movie.

2.6.5.1 Install ShoreTel Presenter for Windows

Step 1 Click Download ShoreTel Presenter.

Step 2 Save file.

Step 3 Run installer.

Application is installed on your computer.

Install ShoreTel Desktop Accelerator for Windows

Step 1 Click ShoreTel Desktop Accelerator.

Step 2 Save file.

Step 3 Run installer.

Step 4 Reboot your computer.

Accelerator is installed on your computer.

2.6.5.2 Install ShoreTel Presenter for Java

Step 1 Start Desktop Sharing Session.

You are prompted to download a Java application.

Step 2 Download and install the application.

NOTE Java 1.6.0.15 or above is required.

Figure 2-32 Download Page

Welcome, Jeff Schoonmaker (c) | [Sign Out](#) | [Help](#)

Access Code:

[Public](#) [My Conferences](#) [Personal Library](#) [My Profile](#)

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

Download

Desktop sharing and importing PowerPoint presentations require the ShoreTel Presenter software. You have two options:

- ShoreTel Presenter (Windows) -- Recommended for Windows users. Installation required.
- ShoreTel Presenter (Java) -- For all users. No installation required.

ShoreTel Presenter (Windows)

- Enables desktop sharing.
- Allows importing of PowerPoint presentations.

Version: **18.6.6019.0** Size: **6.09 MB**

ShoreTel Desktop Accelerator (Windows)

- Improves desktop sharing performance.
- It is recommended to download and install, but optional.

A reboot will be required to complete installation.

ShoreTel Presenter (Java)

- Java 1.6.0.15 or above is required.
- When starting a desktop sharing session, you will be prompted to download a Java application.
- Importing PowerPoint presentations is not supported. You may use PowerPoint to export the presentation as a series of JPEG images, or use a third party program to export the presentation as a Flash movie.

Public

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Version 18.6.6019.0

C H A P T E R 3

Creating Conferences

3.1 Introduction

The ShoreTel system allows you to configure conference settings via multiple interfaces.

3.2 Create a Conference

NOTE You can also create a conference in one click with Outlook. See what.

Step 1 Launch ShoreTel Communicator.

Step 2 On the menu bar, click Windows > Conference Web Portal.

Your ShoreTel Conferencing portal is launched in a web browser.

Step 3 Click Set default time zone.

Step 4 Select the time zone for your geographical location.

Step 5 Click Add a Conference.

The Add a Conference page is displayed (Figure 3-1).

Step 6 In Conference Name, enter a name.

The name is referenced in e-mails about conference sessions.

Step 7 In Date/Time, specify conference type:

Reservation-less: ad-hoc.

Schedule: recurring.

Step 8 Select Start Date.

Step 9 Select Start Time.

Time is based on default time-zone parameter set for your conference viewer.

NOTE Time is automatically calculated for remote users.

Step 10 Select Duration.

Figure 3-1 Add Conference Page

Welcome, Alvin Howard | [Sign Out](#) | [Help](#)
 Access Code:

[Public](#) [My Conferences](#) [Personal Library](#) [My Profile](#)

[Conferences](#) [Recordings](#) [Conference Options](#) [Comments](#)

Add a Conference

Conference Name

Date/Time **Reservation-less:** Start the conference anytime.
 Scheduled:

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: +1-408-962-1776

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](#)

Public

Powered by ShoreTel Version 18.5.5401.0

Step 11 For a recurring conference, check Enable recurrence, then specify an interval:

None: One conference.

Daily: One conference every day.

Weekly: One conference one day per week.

Monthly: One conference one day per month.

Step 12 If you want the ShoreTel system to send you an e-mail invitation to the conference, check Add to my calendar.

The e-mail includes links for launching the conference portal and the page for the conference in your calendar.

You can forward the invitation to others.

NOTE This feature is not supported for recurring conferences.

Step 13 In Description, describe the conference.

The description is posted in the ShoreTel conference viewer.

Step 14 In Login, specify a method for accessing the conference:

Name: participants can access the conference using their names.

Name/Password: participants can access the conference using their name and the conference password.

In Password, type the conference password. You can use up to eight characters in the password.

Step 15 In Dial-in number and Access Code, enter the information needed to access the conference.

NOTE The system automatically generates conference access information for every new conference.

Step 16 In the Participant Code field, enter the code that you want call participants to use to access the conference.

Step 17 In the Host Code field, enter the code that you want the conference host to use to access the conference.

Step 18 In Participant Announcement, select the announcement used when a participant joins or leaves the conference:

None: no announcement is made.

Tone: a tone is played.

Detailed: participants are prompted for their names when joining; names are announced when participants enter and exit.

Step 19 For more conference options, click Show more options (Figure 3-2).

Figure 3-2 Add Conference Page Show More

▼ Hide options

Conference Type

- Start the conference only when host joins.
- 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 for this conference.
- Private comments only:** Participants can only send a private comment to me.
- Disable comments:** Participants cannot post a comment for this conference.

Submit Cancel

Public

Powered by ShoreTel

Version 18.5.5401.0

Step 20 In Conference Type, specify how the conference should start:

Start the conference only when host joins: participants are placed on hold until host joins.

Start the conference only when I join and list the conference on the public page: host must join conference and place conference information on Conference portal in Public before participants can join.

Start the conference when anyone joins: conference starts after first person joins.

Start the conference when anyone joins and make everyone a presenter: conference starts after first person joins, and everyone can present data.

NOTE Conference Type is unavailable for Web conference portal page for audio only.

Step 21 In Outdial Prompt, specify whether participants (including host) called from conference are prompted to join conference:

Require Prompt: called parties must press 1 to join.

No Prompt: called parties can join without a prompt.

Step 22 In Comments, specify how participants can place comments in conference record:

Allow public comments: participants can record comments directly into conference record.

Private comments only: all comments are directed to host for inclusion in conference record.

Disable comments: participants cannot place comments in conference record.

Step 23 Click Submit.

Conference is created.

3.2.1 Set Default Time Zone

The ShoreTel conference Web portal clock, the Default Time Zone, is initially set by the ShoreTel Headquarters server.

You must synchronize the clock to your local time zone:

Step 1 Launch the ShoreTel conference Web portal.

Step 2 Sign in.

Step 3 Click My Conferences.

Step 4 Click Conference.

The date and time you logged in is displayed (Figure 3-3).

Step 5 Click Set default time zone (bottom of page).

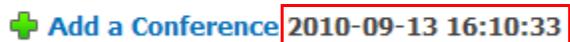
Time zones are displayed.

Step 6 Select your local time zone.

The page is refreshed, and the time zone is reset.

NOTE If your computer is taken to another time zone, reset the default time zone to the new, local time.

Figure 3-3 Login Date and Time



[+ Add a Conference](#) 2010-09-13 16:10:33

3.2.2 Invite Conference Participants through ShoreTel Conference Web Portal

After a conference is created, you can invite additional participants through the ShoreTel conference Web Portal or through your default email application.

NOTE When creating a conference, you can use your Outlook contact list to invite additional participants. Your e-mail invite allows you bring up your Outlook with the conference invite information.

3.2.2.1 Invite Additional Participants

Step 1 Launch the ShoreTel conference Web portal.

Step 2 Sign in.

Step 3 Click My Conferences.

Step 4 Click Conference.

Step 5 Select a conference.

Step 6 Click Invite.

Step 7 Enter email addresses or email groups. (Separate each entry a comma.)

The conference name is automatically generated.

The invitation message is automatically generated.

The default message contains:

- Number for audio portion of conference.
- Participant access code for audio portion of conference.
- Link for the web portion of conference.
- Password for conference (if required).
- Conference date, time, and duration.

NOTE To edit the message, highlight text and type new message. The invite also displays whatever is configured in Additional Calling Information.

Step 8 Click Send Email or Open My Email.

The email is sent from your default email application.

Figure 3-4 Invite Participants

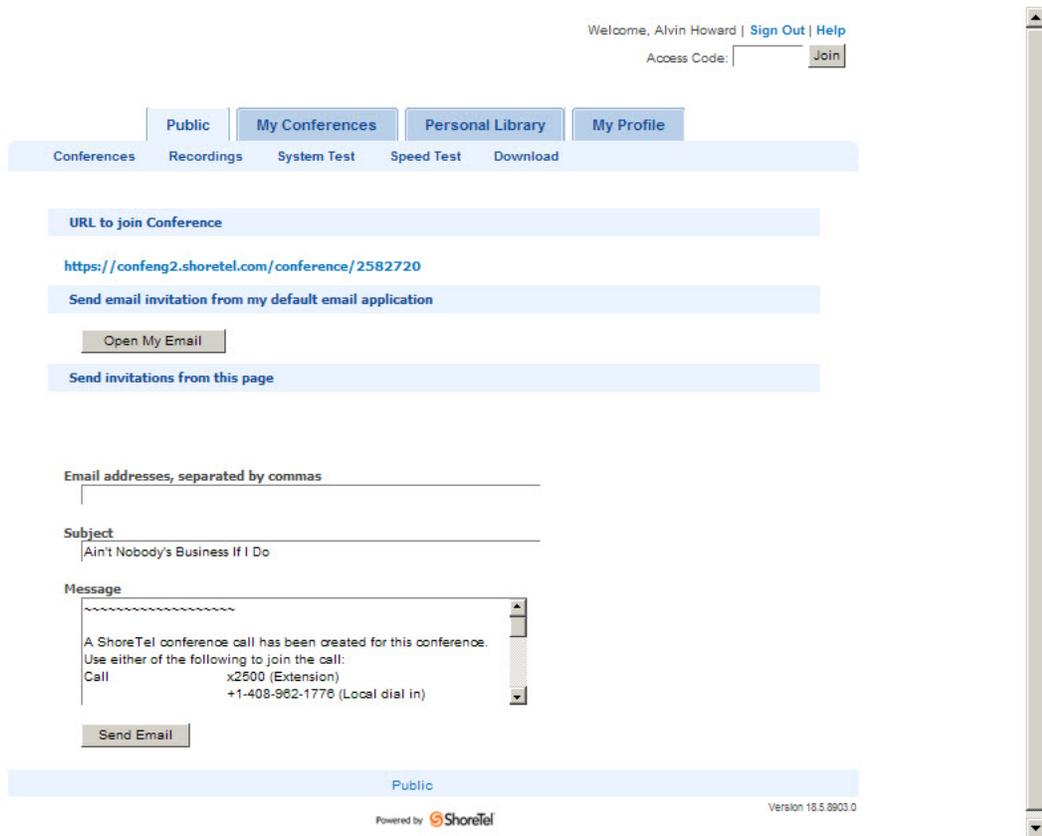
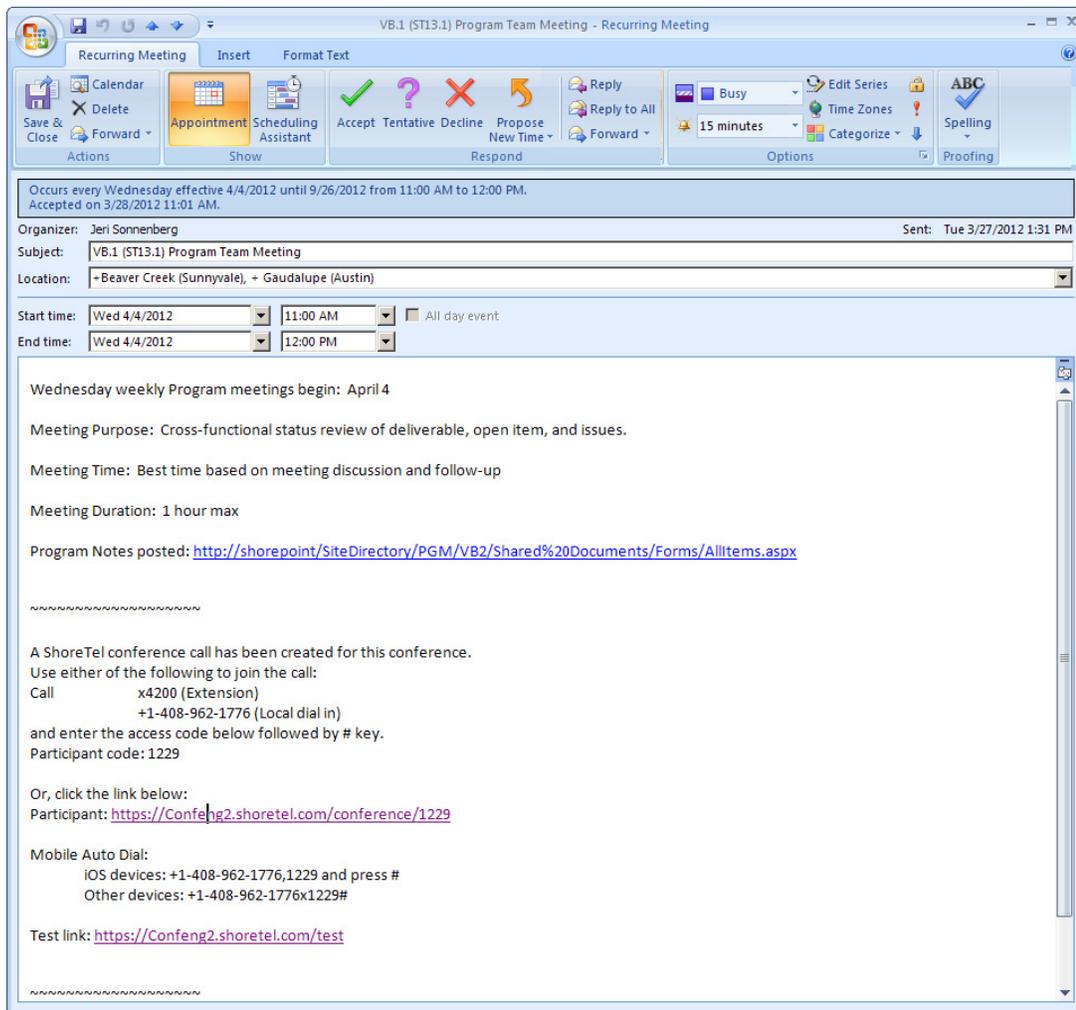


Figure 3-5 Conference Invitation



3.2.3 Edit Conferences

For an existing conference, use Edit to reschedule a conference, change the description, or change other options.

Step 1 Launch ShoreTel conference Web portal.

Step 2 Sign in.

Step 3 Click My Conferences.

Step 4 Click Conferences.

Step 5 Select a conference.

Step 6 Click Edit (Figure 3-6).

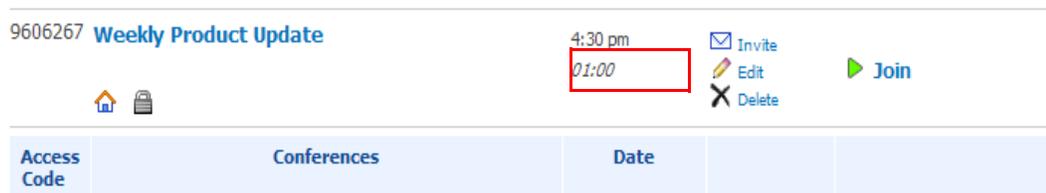
The View Conference Page is displayed.

Step 7 Enter edits.

Step 8 Click Submit.

NOTE Reset resets page to original values. Cancel cancels edit operation.

Figure 3-6 Edit Option for a Conference



3.2.4 View Conference Page Option

View Conference Page displays a summary of information about a specific conference.

Step 1 Launch ShoreTel conference Web portal.

Step 2 Sign in.

Step 3 Click My Conferences.

Step 4 Click Conferences.

Step 5 Select a conference.

Step 6 Click Edit.

Step 7 Click View Conference Page (Figure 3-7).

A page providing information about the conference is opened (Figure 3-8).

Figure 3-7 View Conference Page



Figure 3-8 Conference Information

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

Table 3-1 Conference Information Page

Name	The conference name.
Hosted by	Identifies the conference host.
Join	Button that allows you to join the conference now.
Date/Time	The date the conference was created and the time it is scheduled to meet.
Duration	Specifies how long the conference sessions are scheduled to meet. Identifies the time zone for which the schedule is calibrated.
Download iCalender	Allows you to open the configuration page for the conference in the calendar application in which the conference was created.
Login	Specifies the requirements for participants to join the conference.
Telephone	Specifies the phone number participants dial to access the conference. (Often, this number is for external callers.)
Participant code	Access code participants must use to access the conference.

3.2.5 Delete a Conference

Step 1 Login to My Conferences.

Step 2 Select a conference.

Step 3 Click Delete.

Step 4 Click OK (conference is deleted), or Cancel (operation is canceled).

NOTE Participants are not automatically notified when a conference is cancelled.

Figure 3-9 Conference Listing

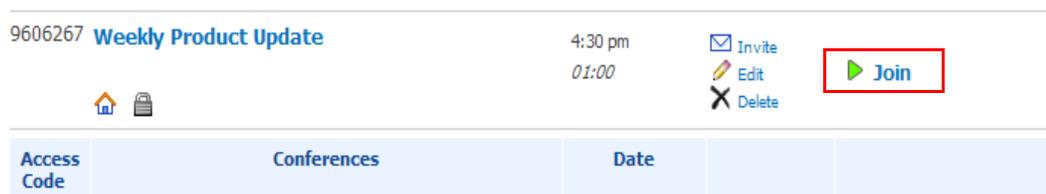
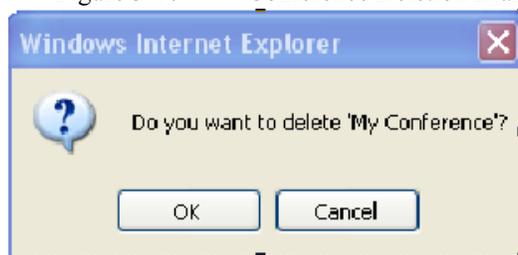


Figure 3-10 Conference Deletion Dialog Box



C H A P T E R 4

Joining and Hosting a Conference

4.1 Introduction

After a conference has been scheduled, the conference host and participants may join the audio and web conferences in one of four ways:

- Participants can click 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 system call them at a number of their choice.
- A participant can dial directly into an audio conference.
- A host can “conference in a participant” by requesting that the system dial the participant’s number from the Conference Viewer.
- A host can add participants users via Phone and via Communicator.

Topics in this chapter include:

- [Enforced Conference Schedules section on page 57](#)
- [Join a Conference section on page 57](#)
- [Host a Conference section on page 66](#)
- [End a Conference section on page 81](#)

4.2 Enforced Conference Schedules

When the system uses enforced scheduling, conference beginning and end times are enforced when the host does not join the conference. Participants can log into a conference up to 10 minutes before the start time when the host has not joined.

If the host does not join the conference, the conference is automatically terminated at the scheduled end time. Five minutes before the conference is scheduled to end, a termination message is posted on the Web pages of participants. At the appointed time, the session is terminated and the participants are redirected to the appropriate Web site.

4.3 Join a Conference

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

4.3.1 Join Conference from Email Invitation

The ShoreTel system can send email messages to parties who are invited to join a conference. The message can include information about the conference, access information for dialing into the conference, and a link for joining the Web session of the conference.

Step 1 Open the email invitation sent to you by the conference host (Figure 4-1).

Step 2 Dial into the conference:

- “Extension” if dialing from ShoreTel phone system.
- “Local dial in” number if calling from outside ShoreTel phone system.

The system informs you that you have reached ShoreTel conferencing and asks for the access code to the conference.

Step 3 Type Participant code, followed by the pound sign.

You may be asked to provide your name.

If you are the first person to join the conference, the system informs you.

If the conference is in progress, the operator is silent.

Step 4 Join the Web session of the conference: Click the link.

The default browser is opened on your device and the ShoreTel Conference page is launched.

The name prompt shown in Figure 4-2 may appear.

Step 5 Type your name in the prompt.

Step 6 Click OK.

The Audio Conference dialog box as shown in Figure 4-3 appears over the ShoreTel conference Web page.

Step 7 Select the method you want to use to dial into the conference.

- I'll call this number: You dial into the audio session of the conference.
- Call me at this number: Type the number where you can be reached; the conference calls you.

Step 8 Click OK.

NOTE Click Cancel if you have already dialed in or you do not intend to dial into the audio session.

The conference viewer appears as shown in Figure 4-4 for the conference host and Figure 4-5 for a conference participant. Your name is listed among the participants in the Participant pane in the conference session Web page.

NOTE For information about using Web conference pages, see [Conference Viewer, starting on page 97](#).

Figure 4-1 Sample Email Invitation Message

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

Figure 4-2 Prompt for Join Web Conference



Figure 4-3 Audio Conference Dialog Box



Figure 4-4 Conference Viewer for Host

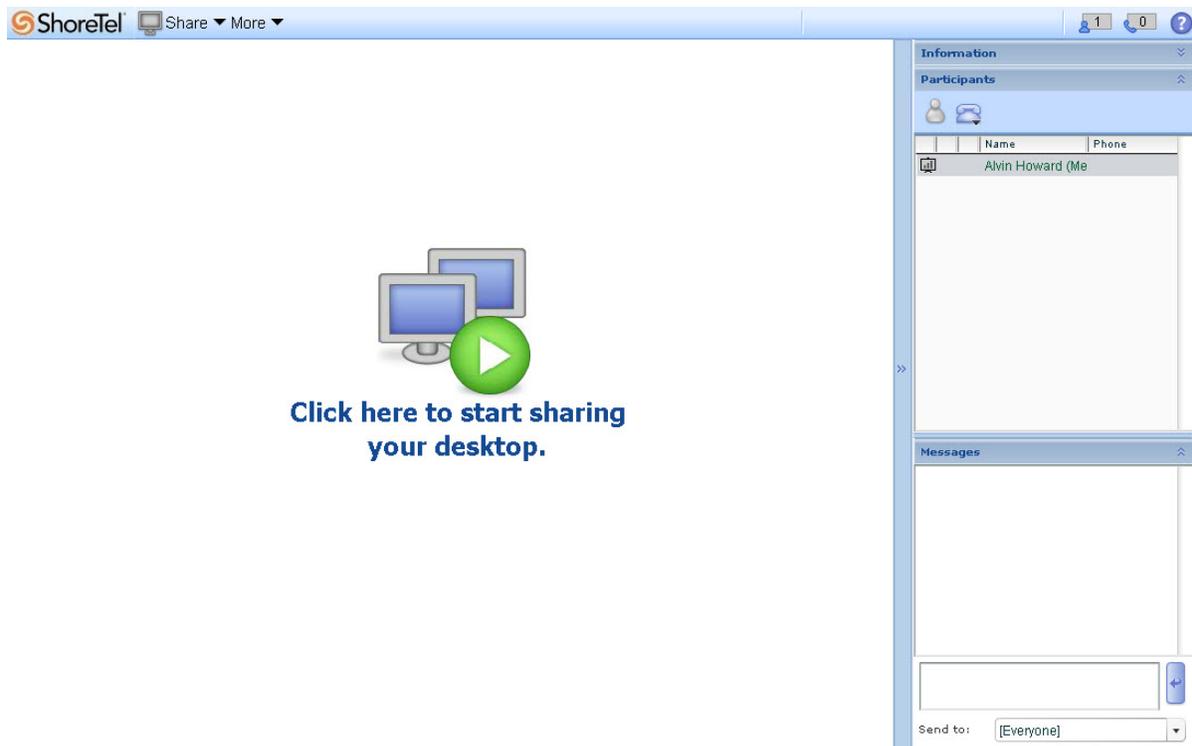
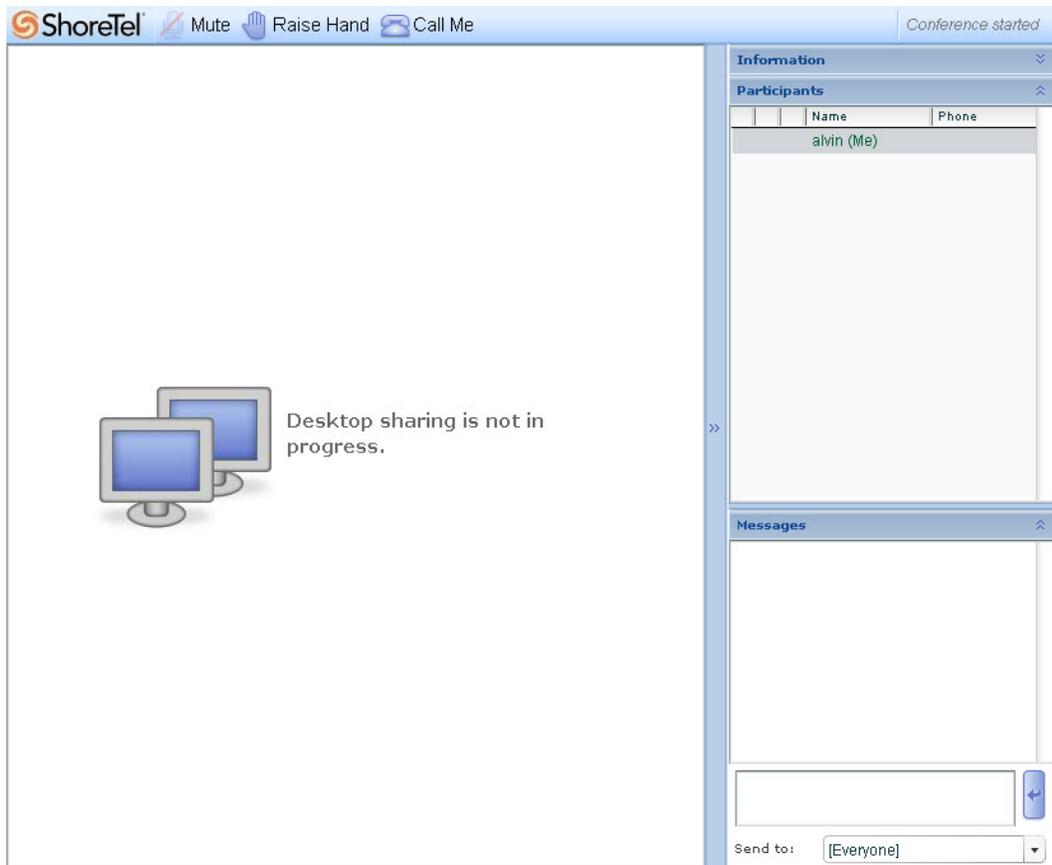


Figure 4-5 Conference Viewer for Participant



4.3.2 Join Conference from ShoreTel Conference Web Portal

You can join conferences from Public or My Conference.

4.3.2.1 Join Conference from Public

Requirements

- Browsers supported: Microsoft Internet Explore 9.0, Firefox 12.0, Safari 5.0

Step 1 Launch a supported browser.

Step 2 In Address, type the URL for the ShoreTel Conference application (provided by your system administrator).

The ShoreTel conference Web portal is opened.

Public is displayed for systems that support audio and Web conferencing (Figure 4-6) or for systems that support audio only (Figure 4-7).

Step 3 In Show, select a conference:

- In-progress conferences: Display list of conferences in progress.
- Today's conference: Display list of all conferences scheduled for today.

Step 4 Click Go.

The page refreshes, listing the conferences.

Step 5 In Name, locate the conference that you want to join.

Step 6 Click the name of the conference.

Step 7 Click Join.

The conference session page is launched.

The name prompt in Figure 4-2 may be displayed. If so, go to Figure 4-9. If not, go to Figure 4-10.

Step 8 Type your name in the prompt.

Step 9 Click OK.

The Audio Conference dialog box is displayed over the ShoreTel conference session page (Figure 4-3).

Step 10 Select the method you want to use to join dial the audio session of the conference.

- I'll call this number: You dial into the audio session of the conference.
- Call me at this number: Type the number where you can be reached; the conference calls you.

Step 11 Click OK.

NOTE Click Cancel if you have already dialed in or you do not intend to dial into the audio session.

The conference viewer for systems that support audio and Web conferencing is opened for the conference host (Figure 4-4) or for a conference participant (Figure 4-5).

Your name is listed among the participants in the Participant pane in the conference session Web page.

NOTE For information about using Web conference pages, see [Conference Viewer, starting on page 97](#).

Figure 4-6 ShoreTel Conference Web Page Public Tab for Web and Audio

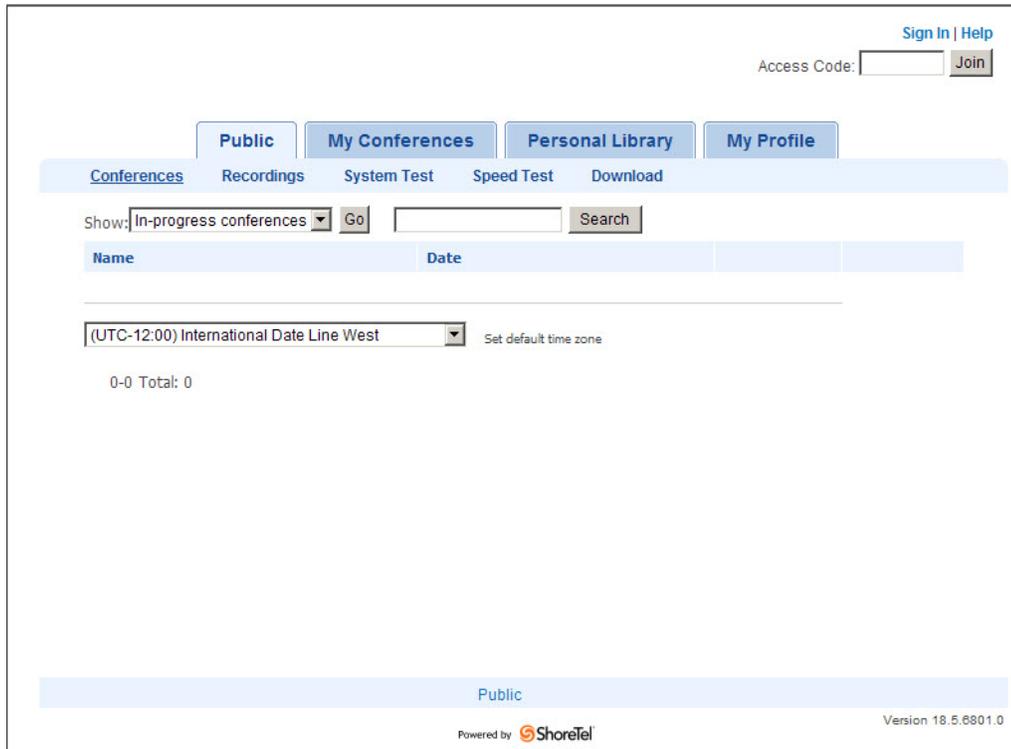


Figure 4-7 ShoreTel Conference Web Page Public Tab for Audio Only

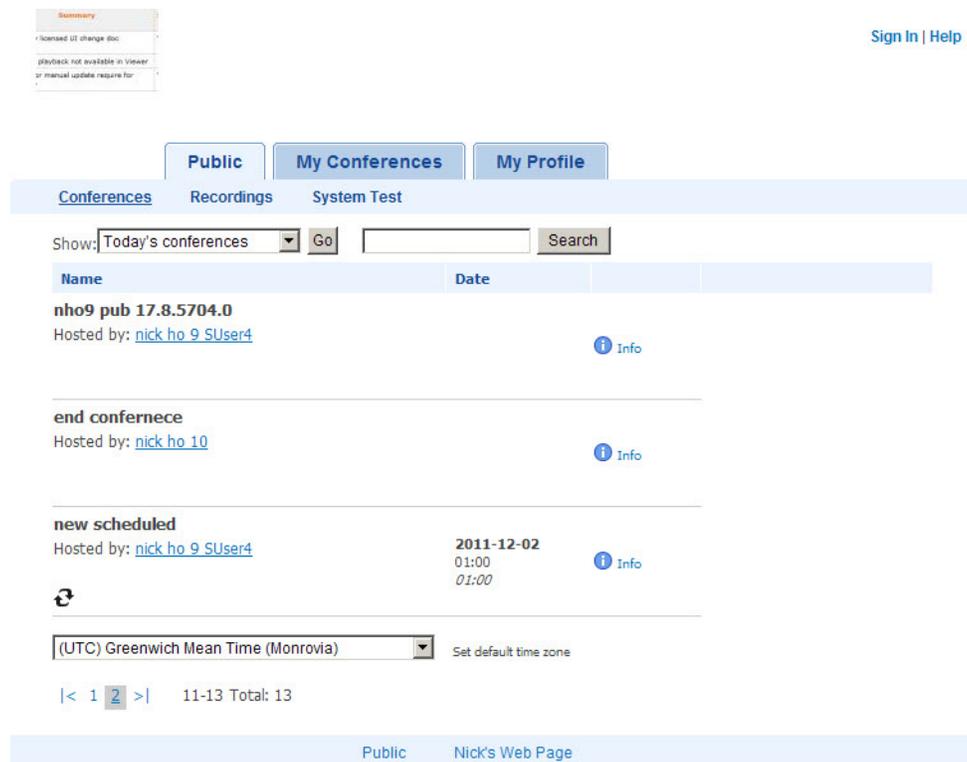


Figure 4-8 Prompt for Join Web Conference



Figure 4-9 Audio Conference Dialog Box



Figure 4-10 Conference Viewer for Host

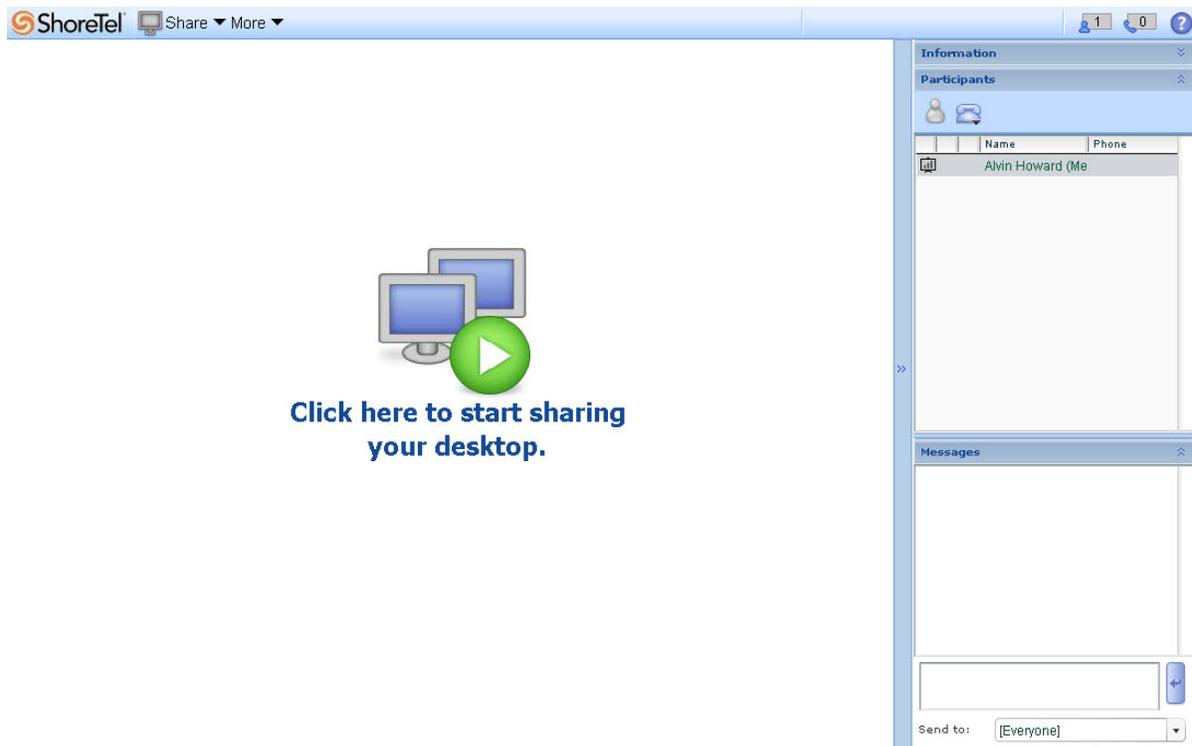
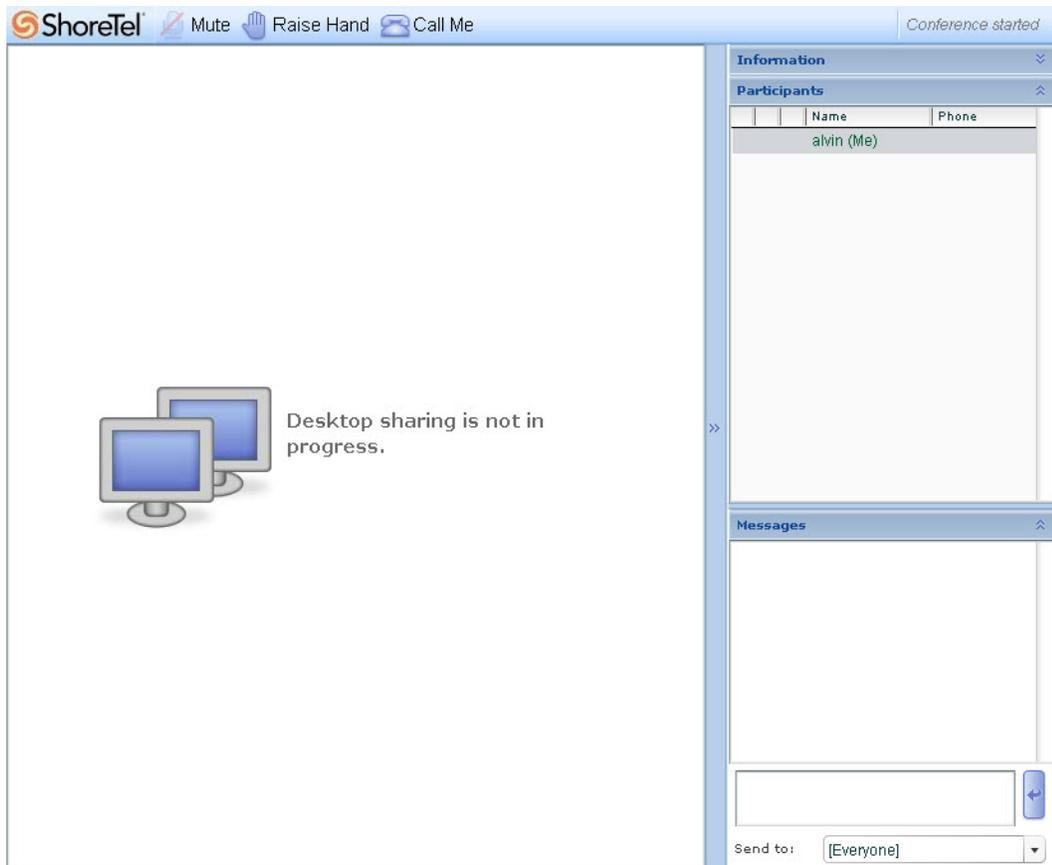


Figure 4-11 Conference Viewer for Participant



4.3.2.2 Join or Start Conference from My Conferences

Step 1 Launch a supported browser.

Step 2 In Address, type the URL of the ShoreTel Conference application (provided by your system administrator).

The ShoreTel conference Web portal is opened.

Step 3 Click My Conferences.

If you are already signed in, My Conferences is opened.

If not signed in, you are prompted to enter your ShoreTel ID and password. My Conferences is then opened.

Step 4 Click the name of a conference.

Step 5 Click Join.

The conference session page is launched, and the Audio Conference dialog box is displayed over the session page (Figure 4-3).

Step 6 Select a way to dial into the audio session of the conference.

- I'll call this number: You dial into audio session of conference.
- Call me at this number: Type the number where you can be reached; the conference calls you.

Step 7 Click OK.

NOTE Click Cancel if you have already dialed in or you do not intend to dial into the audio session.

4.3.2.3 Join Conference using Access Code

Every conference has an access code for participants and an access code for the host.

The participant code allows the user to join the conference session. The participant code is provided in the e-mail invitation and the info page for conferences listed on Public.

The host code allows the user to manage the conference session. The host access code is available in the conference profile.

Step 1 Obtain the participant or host code for the conference.

Step 2 Launch the ShoreTel conference Web portal.

Step 3 In Access Code, enter the access code.

Step 4 Click Join.

If the host access code is entered, the host conference page is launched.

If the participant access code is entered, the participant conference page is launched and the conference is either started or is waiting to start.

If a participant is informed that there is no conference, the conference is scheduled to start at another time. In this situation, access the conference within five minutes of the scheduled start time or when the host has joined the conference.

4.3.2.4 Conference Session Status

When you join a conference session, the session status is displayed in the session Web page on the right side of the toolbar:

- Blank—The conference is in progress.
- “It is too early to start”—Conference is not scheduled to start. Try again later.
- “Conference started”—You are the first participant.
- “Waiting for conference to start”—You have secured a port but the conference has not started. Wait for the conference to start.

4.4 Host a Conference

The host is the owner of the conference profile. The host can manage both the profile and conference sessions.

When the host joins a conference, the Web conference page for the host (see Figure 4-4) is displayed on host’s desktop. From there, the host can manage the conference session.

The host can share applications, give permission to participants to share applications, implement recording the session, have the system dial participants, delete participants from the session, end the session, and more.

For information about host conference viewer, see [Host Web Conference Page section on page 97](#).

NOTE Conferences can be configured and conducted without a host. In unhosted conferences, session management capability is not available, and scheduling is enforced if set by the system administrator.

4.4.1 Join Conference as Host

There are two ways to join a conference as a host:

- Log in as Host from inside a Conference:
You are automatically made the host of the session.
- Log in as Host from ShoreTel Conference Web Portal:
You must log in as the host to host the session.

4.4.1.1 Log in as Host from inside a Conference

Requirements

- Your ShoreTel user ID.
- Your ShoreTel user password.

Step 1 Click Login on the ShoreTel conference toolbar.

The Login dialog box is opened.

Step 2 Enter your ShoreTel user ID.

Step 3 Enter your ShoreTel user password.

Step 4 Click Sign In.

The browser is refreshed, and the conference host page is opened.

Figure 4-12 Login Dialog Box



4.4.1.2 Log in as Host from ShoreTel Conference Web Portal

Requirement

- Host access code.

Step 1 Access the ShoreTel conference Web page.

Step 2 In Access Code, enter the host access code.

The conference viewer is launched and opened at the host Web page.

4.4.2 Share Desktop

Windows desktops are shared using Windows Presenter. Mac desktops are shared using ShoreTel Presenter for Java.

4.4.2.1 Initiating Desktop Sharing

Step 1 After starting the conference, click Share on the conference toolbar.

A drop-down menu is opened.

NOTE If sharing for the first time on Windows, you are prompted to select ShoreTel Presenter. From here, follow the prompts.

Step 2 Choose Entire Desktop.

A red “presenter” frame is drawn around your entire desktop.

See [Conference Presenter, starting on page 83](#) for more information about using presenter frame.

After desktop sharing is initiated, Presenter provides tools for managing the shared desktop.

Presenter Tools

- **Pause:** Pause desktop sharing. The central screen is blank until desktop sharing is restarted (Figure 4-13).

Figure 4-13 Pause Icon



- **Show Menu:** Open tools for managing the quality of desktop sharing and applications (Figure 4-14 and Figure 4-15).

Figure 4-14 Show Menu Icon



Figure 4-15 Show Menu Drop-down Menu



- **Pointer:** Point to items on your desktop or in an application (Figure 4-16).

Figure 4-16 Pointer

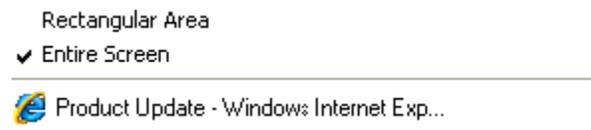


- Tools for Managing Image Quality and Screen Resolution:
 - Refresh Rate: Determines how much data is transmitted. Options are low, medium, and high. Default is medium.
 - Image Quality: Determines the image quality of data. Options are low, medium, and high. Default is medium.
 - My Screen Resolution: 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: Determines how much of your screen you share (Figure 4-17). Select the application you want to share, or manipulate the presentation area you want to share.

Figure 4-17 Choose Sharing Window Icon



Figure 4-18 Choose Sharing Window Menu



4.4.2.2 End Desktop Sharing

- Click Stop icon (Figure 4-19) or Stop button on toolbar as shown in x.
- You can also select Close to end desktop sharing.

Figure 4-19 Stop Icon



Figure 4-20 Stop Button



4.4.2.3 Share Files from Conference Library

Files stored in the ShoreTel conference Web portal library can be shared during conferences. The files can be uploaded to a user’s public space (shared library) or personal space (personal library).

Files uploaded to the public space can be used by anyone presenting in a conference.

Files uploaded to a private space can be used only by the owner of the personal library.

For information about uploading files to the library, see [Personal Library section on page 28](#).

To share a file from the library:

Step 1 Click the Share button on the toolbar.

The Share menu is displayed (Figure 4-21).

Step 2 Click Personal Library or Shared Library.

- Personal Library: Files uploaded to your personal library in the ShoreTel conference Web portal.
- Shared Library: Files uploaded to your public library in the ShoreTel conference Web portal.

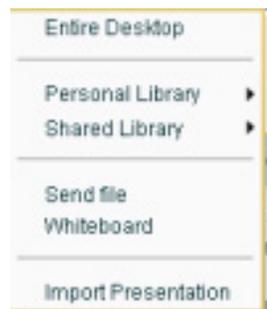
A list of files is displayed.

NOTE If you are not the host, you must sign into the conference in order to display the Personal Library option.

Step 3 Click the file that you want to share.

The file is opened in the conference viewer.

Figure 4-21 Share Menu



4.4.2.4 Import Presentations

This option allows you to merge PowerPoint files with the whiteboard for presentations that you can mark in real time.

When you import a PowerPoint file, the slides are integrated with the whiteboard in the conference session. The whiteboard tools are displayed with presentation slides on the conference page, and the conference toolbar is modified so you can select the PowerPoint slide you want to display.

All participants can use the whiteboard tools to mark slides and select the slide displayed.

Modifications made to the slides using the whiteboard tools are retained as long as the conference is in session.

The presenter can import multiple PowerPoint files for a single conference session. The names of the files imported by the presenter are listed in the Share menu of the presenter only. Only one file can be displayed in the conference viewer at any one time. The files can be used as long as the conference is in session, even if the presenter leaves the conference.

NOTE This feature is not supported on Macs.

To import and use a PowerPoint file in a Web conference session:

Step 1 Stop sharing the desktop.

Step 2 Click Share.

The Share menu is opened.

Step 3 Click Import Presentation.

The Launch Application dialog box is opened (Figure 4-22).

Step 4 Select VPresent, then click OK.

VPresent is the default value.

The Select File dialog box is opened.

Step 5 Navigate to and select a PowerPoint file.

PowerPoint is launched in the background on the computer.

The presentation slides are loaded and integrated with the whiteboard in the conference session.

The integrated page is displayed (Figure 4-23).

Step 6 Repeat Steps 2 through 5 for each presentation you want to import.

NOTE After the slides are loaded, you can close the PowerPoint application.

Figure 4-22 Launch Application Dialog Box

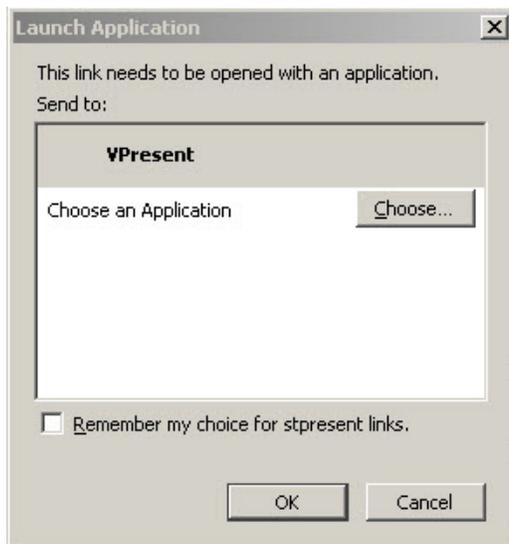
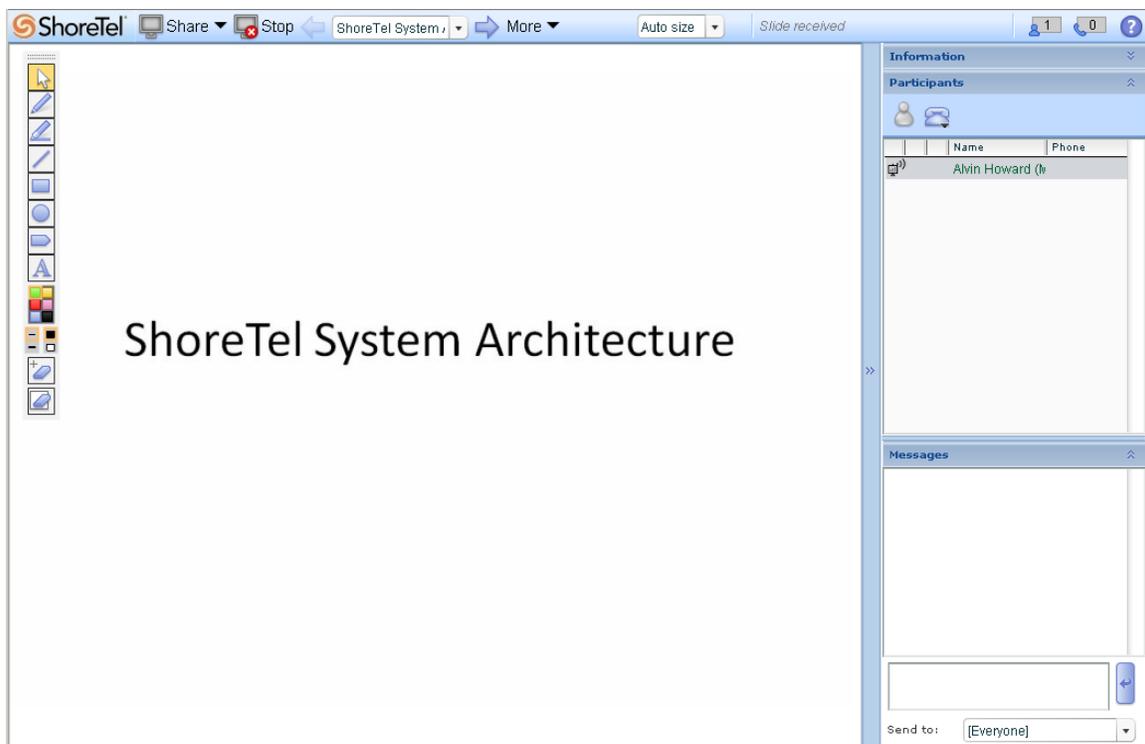


Figure 4-23 Integrated Web Conference Page with Whiteboard and PowerPoint Slide



Integrate Presentations

After the slides in the PowerPoint presentation are imported into the conference session, you use the ShoreTel conference Web page to present the presentation.

Also, you can use the whiteboard tools to mark presentation slides.

Presentations are handled independently of each other. When multiple presentations are imported into a conference session, only one presentation is loaded into the conference session page at a time. The presentation is available to all conference participants having presentation privileges.

To change or display a slide:

- Step 1 Locate the field providing information about the presentation between Share and More on the toolbar.
- Step 2 Click the right arrow to advance to the next slide.
- Step 3 Click the left arrow to move to the previous slide.
- Step 4 Click the field and select the slide that you want to display.
The screen is refreshed, and the slide is displayed.

To use whiteboard tools:

- Step 1 Select a tool.
- Step 2 Move the cursor to the point where you want to start marking.
- Step 3 Click and drag the mouse as necessary.
Marks are retained until the presentation is closed.
Marks cannot be saved directly, but you can record the Web conference session. See [Record a Conference section on page 79](#) for information about recording a conference.
- Step 4 To adjust the size of the presentation in the Web page, click the field to the right of More on the toolbar and select the screen size that you want to use for displaying slides.
- Step 5 To clear the page without stopping share, click Stop.

4.4.2.5 Whiteboard

- Presenters can use the whiteboard to create and share drawings.
- Drawings have basic drawing forms (lines, shapes, text, color, and a pointer).
- Drawings can be recorded during a conference.
- Drawing control can be passed from host to participants.
- Multiple whiteboards can be created in the same conference.
- Whiteboards can be deleted, but one whiteboard is always 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.

Access and Use a Whiteboard

Step 1 Open the conference as host.

Step 2 Click Share.

The drop-down menu is opened.

Step 3 Click Whiteboard.

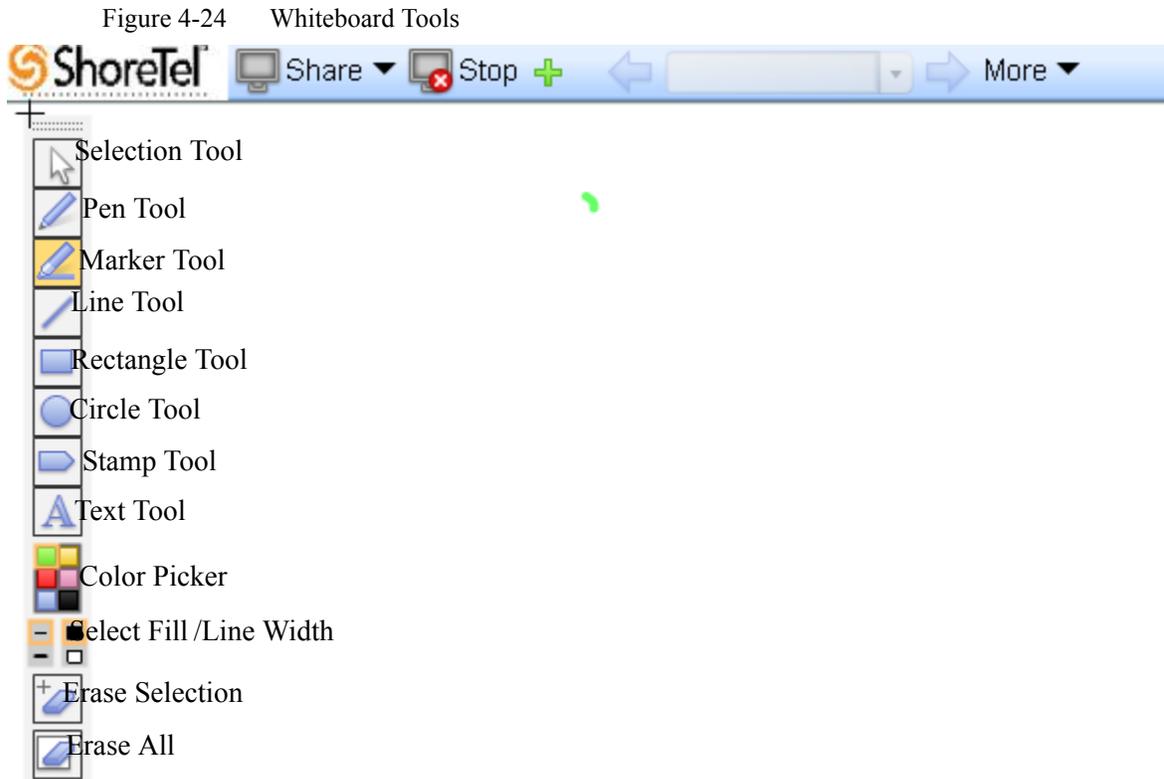
Step 4 The whiteboard tools are opened on the left side of the conference viewer.

Figure 4-24 shows and identifies the whiteboard tools.

Step 5 To add an additional whiteboard, click + on the toolbar (Figure 4-25).

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

NOTE To save a whiteboard, record the conference.



Delete a Whiteboard

Whiteboards are automatically deleted when you leave a session.

To manually delete a whiteboard:

Step 1 In the field that identifies the whiteboard that is being displayed, select the a whiteboard.

Step 2 Click the - (minus sign) icon (Figure 4-26).

A confirmation message is displayed (Figure 4-27).

Step 3 Click Yes.

The page is refreshed, and another whiteboard is opened, or the Share Desktop page is displayed.

Figure 4-26 Whiteboard Delete Icon

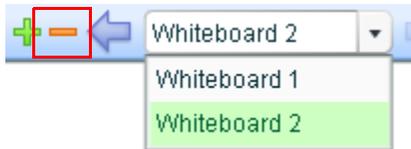
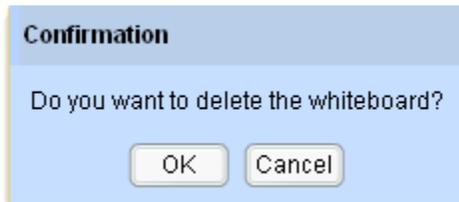


Figure 4-27 Whiteboard Delete Confirmation Dialog Box



Stop and Restore Whiteboard Sharing

You can stop sharing the whiteboard during a conference session; the whiteboard is removed from the viewer.

You can restore the whiteboard at any time; he latest changes are displayed.

To stop whiteboard sharing:

Step 1 Click Stop.

The conference page is refreshed, and the Start desktop sharing page is displayed.

To restore whiteboard sharing:

Step 1 Click Share > Whiteboard.

The whiteboard is restored in the viewer.

4.4.2.6 Chat Messaging

The conference host can send messages to everyone in the conference or to individual participants.

A participant's reply can be viewed by all of the conference participants or by an individual participant.

To send a chat message:

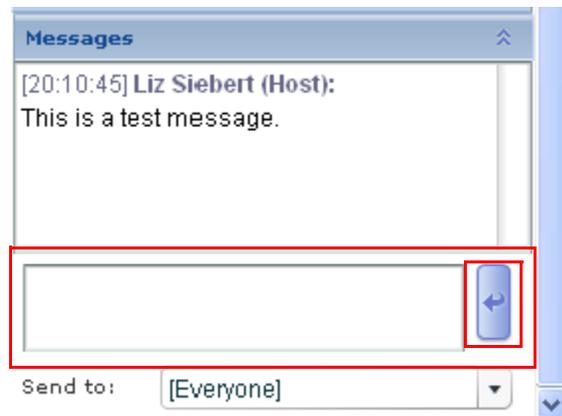
Step 1 Type the message in the message area (Figure 4-28).

Step 2 Choose the recipient from the drop-down menu.

Step 3 Click the arrow to send the message.

NOTE To view messages, open the message window.

Figure 4-28 Message Text Box



4.4.2.7 Presenter Control

During a conference, the host can delegate presentation controls to any participant.

The participant can then control the following:

- Screen share
- Whiteboard drawing
- Library share
- Send or upload file
- Import presentations (Windows only)

NOTE A host cannot pass audio control to a participant. After a host passes presentation control to a participant, the host continues to control the participant list (mute, lock etc.).

Delegate Presenter Control

Step 1 Highlight a participant.

Step 2 Click Participant Options.

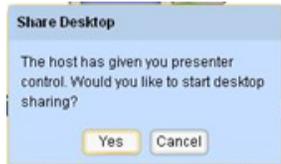
The menu is opened.

Step 3 Select Allow Presenting.

The participant is sent a message prompting for desktop sharing (Figure 4-29).

Control is delegated if the participant clicks Yes.

Figure 4-29 Share Desktop Message box



End Presenter Rights

Step 1 Highlight the participant.

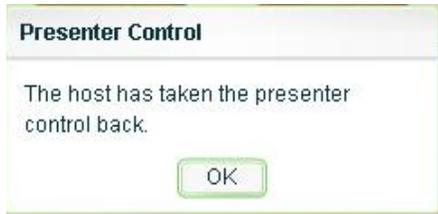
Step 2 Click the Participant Options.

The menu is opened.

Step 3 Select Discontinue Presenting.

The participant is sent a message indicating that the host is taking back control (Figure 4-30).

Figure 4-30 Presenter Control Message Box



4.4.3 Record a Conference

- Only a host can record conference sessions.
- A recording can be started and stopped at any point during the session.
- Multiple recordings can be made of the same session.
- Each recording is assigned a recording ID and is listed under the recording tab in the Web conference portal for the conference.
- When Web Conferencing is enabled, audio and Web portions of the conference are recorded.

NOTE You can record up to eight consecutive hours in a conference.

4.4.3.1 Start a Recording from a Web Conference Portal

- By default, the name of the recording is the same as the name of the conference.

Step 1 Join a conference as the host.

Step 2 To ensure that the audio portion of the conference is recorded, dial into the conference or make sure that someone is dialed into the conference.

NOTE You must stop ShoreTel desktop sharing or any streaming application before you can start recording.

Step 3 Click More > Start Recording.

A prompt on the audio session informs participants that the call is being recorded.

When there is no audio session, a message is displayed to inform the host that only a Web session is being recorded.

Step 4 Click OK.

Recording is continued.

When desktop sharing is in progress, a message is displayed to inform the host that desktop sharing must be stopped or paused to start the recording.

Step 5 Click OK.

Desktop sharing is stopped.

After the recording is started, restart desktop sharing.

The recording is started.

The Stop Recording button is displayed on the menu bar (Figure 4-31).

Figure 4-31 Stop Recording Button



4.4.3.2 Stop a Recording from a Web Conference Page

Step 1 Click More > Stop Recording, or click the Stop Recording button.

The stop recording message dialog is opened (Figure 4-32).

Step 2 Click OK.

A confirmation message dialog is opened (Figure 4-33).

Step 3 Click OK.

NOTE When you stop a recording, only the recording is stopped; the audio and Web sessions continue.

Figure 4-32 Stop Recording Message Dialog Box

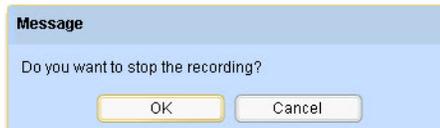


Figure 4-33 Stop Recording Confirmation Message



4.4.3.3 Start and Stop a Recording from an Phone

- A host can start and stop a recording using the keypad of a ShoreTel phone.
- Both audio and Web portions of the conference are recorded.
- To use the ShoreTel phone to start and stop recording a conference:

Step 1 Join the conference as the host.

NOTE Use the host access code when dialing into the conference.

Step 2 On the keypad, press # then 4.

The audio participants are informed that the conference is being recorded.

Step 3 To stop the recording, press # then 4.

The audio participants are informed that the recording has stopped.

4.5 End a Conference

- Only the host can end a conference.
- If the host does not participate in a conference or leaves early, the conference is terminated after the last participant exits.
- Participants may leave a conference at any time. Participants are not required to log out of a conference.
- To leave a conference, close the conference browser window.

To end a conference:

Step 1 Join the conference as host.

Step 2 Click More > End Conference.

A confirmation message box is opened.

Step 3 Click OK.

Participants are notified, and the conference is ended.

C H A P T E R 5

Conference Presenter

5.1 Introduction

ShoreTel Presenter enables a conference participant to share desktop content with other conference participants.

Sharing is possible only if ShoreTel Presenter is installed on the computer sharing the desktop and the computer(s) receiving the shared content. (ShoreTel Presenter is automatically installed with ShoreTel Communicator.)

Only one participant can present at a time. Depending on the configuration of the conference, the default presenter is the host. (The host can give permission to other participants to share their desktop, or the conference can be configured so any participant can share.)

When a participant launches presenter, the desktop is outlined in a red frame.

The participant can adjust the display sharing settings to accommodate different display resolutions and select a specific application to share.

ShoreTel supports two presenter applications:

- ShoreTel Presenter for Windows
- ShoreTel Presenter for Java

They provide the same basic features and functions.

5.2 ShoreTel Presenter for Windows

ShoreTel Presenter for Windows can present PowerPoint presentations.

ShoreTel Presenter for Windows also includes a Desktop Accelerator that can optimize the rendering of shared pages.

5.2.1 Presenter for Windows Installation Requirements

- ShoreTel Web Conferencing service
- A web browser:
 - Microsoft Internet Explore 9.0
 - Firefox 12.0 (supports Windows and Mac operating systems)
 - Safari 5.0
- Adobe Flash 9 or later
- Java 1.6.0.15 Runtime Environment or later

5.2.2 Install ShoreTel Presenter for Windows

Step 1 Download the Java RunTime Environment.

Step 2 Install Presenter.

5.2.3 Install ShoreTel Presenter for Windows using ShoreTel Conference Web Portal

Download and install ShoreTel Presenter for Windows on the computer used for desktop sharing (if Presenter for Windows is not pre-installed via Communicator).

Presenter for Windows can be downloaded from your company ShoreTel conference Web portal:

Step 1 Launch your Web browser.

Step 2 In the address field, type the URL for your company ShoreTel conference Web portal.

(If you do not know the URL, contact your ShoreTel system administrator.)

The Public tab of the ShoreTel conference Website is displayed (Figure 5-1).

Step 3 Click Download.

The Download page is displayed (Figure 5-2). You can also access this page from the My Conference tab by clicking Download Presenter Software.

Step 4 Click Download ShoreTel Presenter.

The File Download Security Warning dialog box is opened.

Step 5 Click Run.

Step 6 Presenter for Windows is downloaded.

The ShoreTel Presenter Installation Wizard is opened.

Step 7 Follow the prompts.

Figure 5-1 ShoreTel Conference Web Portal Public Page



Figure 5-2 Download Page for ShoreTel Presenter

[Sign In](#) | [Help](#)

Access Code:

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

Conferences | Recordings | System Test | Speed Test | **Download**

Download

Desktop sharing and importing PowerPoint presentations require the ShoreTel Presenter software. You have two options:

- ShoreTel Presenter (Windows) -- Recommended for Windows users. Installation required.
- ShoreTel Presenter (Java) -- For all users. No installation required.

ShoreTel Presenter (Windows)

- Enables desktop sharing.
- Allows importing of PowerPoint presentations.

Version: **18.5.8903.0** Size: **6.02 MB**

ShoreTel Desktop Accelerator (Windows)

- Improves desktop sharing performance.
- It is recommended to download and install, but optional.

A reboot will be required to complete installation.

ShoreTel Presenter (Java)

- Java 1.6.0.15 or above is required.
- When starting a desktop sharing session, you will be prompted to download a Java application.
- Importing PowerPoint presentations is not supported. You may use PowerPoint to export the presentation as a series of JPEG images, or use a third party program to export the presentation as a Flash movie.

Public

Powered by  ShoreTel

Version 18.5.8903.0

5.3 ShoreTel Presenter for Java

- Provides an alternative way to share a desktop on Windows, without having to install any software.
- Provides the only way to share Mac desktops.
- Can be used on Windows desktops, but a special keyboard sequence is required.
- Includes a Sharing Rectangle that can be moved about the screen, allowing desktop sharing on a secondary monitor or across multiple monitors.
- Does not have a Preview screen.
- Does not include a Custom sharing rectangle.

5.3.1 Presenter for Java Installation Requirements

- ShoreTel Web Conferencing service
- A web browser:
 - Microsoft Internet Explore 9.0
 - Firefox 12.0 (supports Windows and Mac operating systems)
 - Safari 5.0
- Adobe Flash 9 or later
- Java 1.6.0.15 Runtime Environment or later.

This software must be downloaded on a participant's computer to participate in desktop sharing.

5.3.2 Install ShoreTel Presenter on Mac

Step 1 Download the Java RunTime Environment.

Step 2 Install Presenter.

5.4 ShoreTel Presenter

- Launching Presenter
- Presenter Features

5.4.1 Launch Presenter

Step 1 Join a conference as the host, or join a conference that allows all participants to share the desktop.

Step 2 In the Start Sharing Desktop page, click the button to start sharing your desktop. The ShoreTel Presenter Software dialog box is opened (Figure 5-3).

NOTE To launch an alternative presenter, press Shift and click the button to start sharing your desktop.

Step 3 Select a default ShoreTel Presenter:

- Click Windows Presenter.

This is recommended for computers using Windows.

- Click Java Presenter.

You must select this option for Mac computers. You can also use this option for Windows computers.

Step a Click Remember my selection.

Your selection is used as the default presenter launched on this computer for desktop sharing.

Step b Click OK.

NOTE If you see a pop-up security warning, click continue or allow.

ShoreTel Presenter for Windows is opened (Figure 5-4).

ShoreTel Presenter for Java is opened (Figure 5-5).

The sharing area is enclosed in a red border.

Figure 5-3 ShoreTel Presenter Software Dialog Box



Figure 5-4 ShoreTel Presenter for Windows

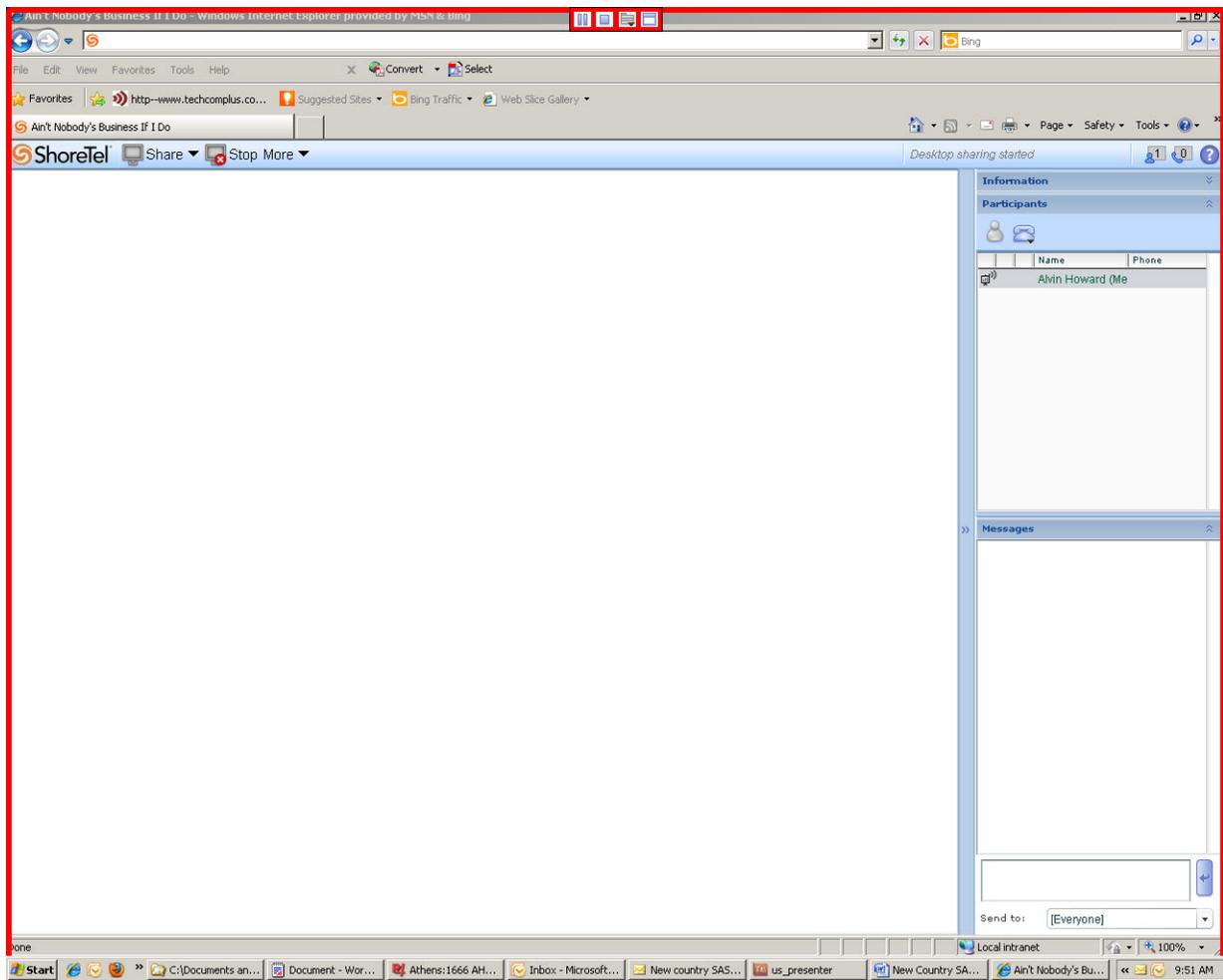
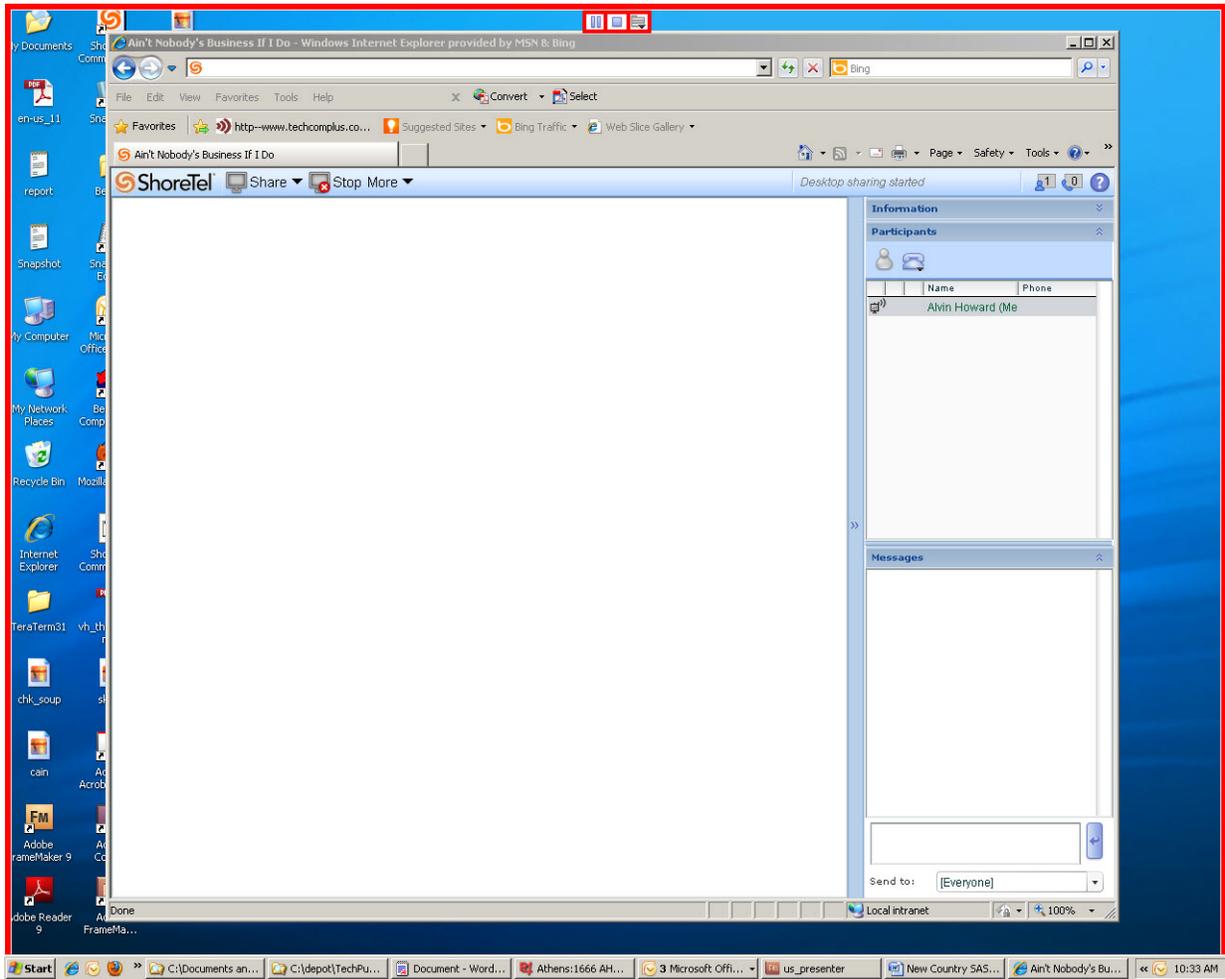


Figure 5-5 ShoreTel Presenter for Java



5.4.2 ShoreTel Presenter Icons

Figure 5-6 ShoreTel Presenter for Windows Icons



Figure 5-7 ShoreTel Presenter for Java Icons



5.4.2.1 Pause Sharing

Figure 5-8 Pause Icon



5.4.2.2 Start Sharing

Figure 5-9 Start Sharing Icon



5.4.2.3 Close Presentation

Figure 5-10 Close Icon



5.4.2.4 Presenter Menu

The Presenter menu for Windows is different from the Presenter menu for Java.

Figure 5-11 Show Menu Icon



ShoreTel Presenter for Windows Drop-down Menu

Figure 5-12 ShoreTel Presenter for Windows Drop-down Menu

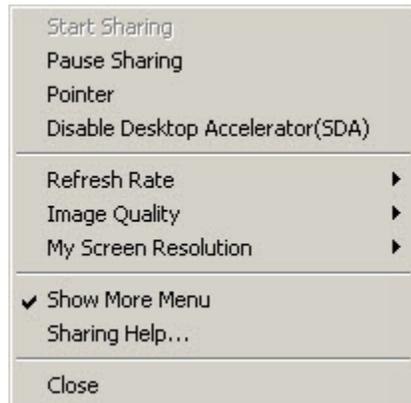


Table 5-1 ShoreTel Presenter for Windows Show Menu Options

Start Sharing	Start (or resume) desktop sharing.
Pause Sharing	Pause sharing.
Disable Desktop Accelerator (SDA)	The Deskshare Accelerator (SDA) helps render conference content. It is installed with ShoreTel Communicator for Windows. (It can also be installed independently.) If SDA conflicts with other accelerator programs installed on your computer, nothing is shared. Disable SDA under these circumstances.
Refresh Rate	<ul style="list-style-type: none"> • Low (low bandwidth). • Medium. • High (high bandwidth).
Image Quality	<ul style="list-style-type: none"> • Low (low bandwidth). • Medium. • High (high bandwidth).
My Screen Resolution	<ul style="list-style-type: none"> • Original (default). • 1024 × 768. • 800 × 600.
Show More Menu	Expand or contract menu options.
Sharing Help	Help system.
Close	Close Presenter; end desktop sharing.

ShoreTel Presenter for Java Drop-down Menu

Figure 5-13 ShoreTel Presenter for Java Drop-down Menu

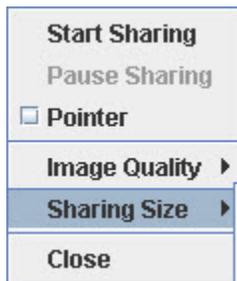


Table 5-2 ShoreTel Presenter for Java Drop-down Menu Options

Start Sharing	Start (or resume) desktop sharing.
Pause Sharing	Pause sharing.
Image Quality	<ul style="list-style-type: none"> • Low (low bandwidth). • Medium. • High (high bandwidth).
Sharing Size	<ul style="list-style-type: none"> • Entire screen (at default resolution). • 1024×768, 800×600, 640×480.
Close	Close Presenter; end desktop sharing.

5.4.3 Choose Sharing Window

The sharing area is automatically adjusted when the presenter screen-size setting is changed.

The size and position of the sharing area can be manually adjusted.

NOTE This option is not available in ShoreTel Presenter for Java.

Figure 5-14 Choose Sharing Window Icon



Table 5-3 Choose Sharing Window Options

Rectangular Area	Change the size of the presentation area. By default, the rectangle is placed in the center of the screen. Drag-and-drop to adjust the size and position of the rectangle.
Entire Screen	The default.
Applications Currently Open	Click an application to display it in Presenter. Only the selected application is displayed.

5.4.4 Select Sharing Area

The default sharing area is the entire screen. It can be reduced to a smaller area. The sharing area displays one application at a time.

5.4.4.1 Specify an Application to Display in ShoreTel Presenter for Windows

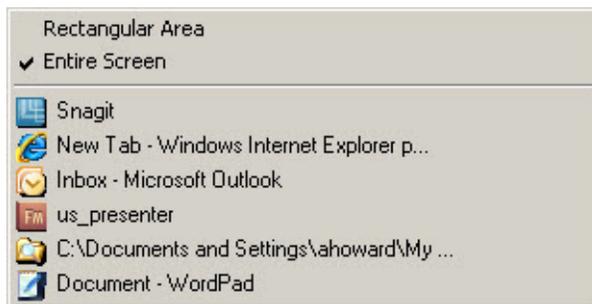
Step 1 Click Choose Sharing.

The menu is displayed (Figure 5-15).

Step 2 Select an application

The application is outlined in red.

Figure 5-15 Chose Sharing Drop-down Menu



5.4.4.2 Modify Sharing Area in ShoreTel Presenter for Windows

Step 1 Click Choose Sharing.

The menu is displayed (Figure 5-15).

Step 2 Click Rectangular Area.

The sharing area is displayed in the middle of the screen.

The icons are located in the top, left-hand corner.

Step 3 To move the sharing area:

Step a Place the cursor on the border.

The Move tool is opened.

Step b Hold down the right mouse button, then drag the sharing area to another position.

Step 4 To modify the size of the sharing area:

Step a Place the cursor in one of the corners.

The double-arrow Move tool is opened.

Step b Hold down the right mouse button, then stretch or shrink the sharing area.

5.4.4.3 Reposition Sharing Area in ShoreTel Presenter for Java

In ShoreTel Presenter for Java, you can reposition the sharing area when changing the resolution.

Only content displayed in the frame on the sharing desktop is broadcast to conference participants.

Step 1 Click Show Menu.

Step 2 Select Sharing Size, then select the resolution.

The sharing area is refreshed in the center of the desktop.

Step 3 To reposition the sharing area:

Step a Place the cursor on the border.

The Move tool is opened.

Step b Hold down the right mouse button, then drag the sharing area to another position.

5.5 Setting Sharing Resolution

By default, the entire desktop is shared using the resolution configured for the display of the sharing computer.

For example, if the resolution of the sharing computer is 1280×1024, the resolution of the shared desktop is 1280×1024.

Participants using displays set for a different resolution experience resolution mismatch. Participants using higher resolution receive the image as sent, with reduced detail. Participants using lower resolution may experience degraded image quality.

To accommodate lower resolution, Presenter allows participants to temporarily override the display resolution settings of the sharing computer. When the override is invoked, Presenter changes the current display resolution. When Presenter is closed, the resolution reverts to the configured setting.

The image exported by Presenter is displayed in a frame in the Web conference session page.

5.5.1 Change Resolution of ShoreTel Presenter for Windows

Step 1 Click Show Menu.

The menu is displayed.

Step 2 Select My Screen Resolution > *resolution value*.

The *resolution value* applies to the conference.

The screen refreshes to the selected resolution.

Images on the desktop are recalibrated to the new resolution.

Participants see the sharing area.

If necessary, resize the presented application to ensure that participants can see an entire image.

All opened applications are automatically resized to the new resolution.

5.5.2 Change Resolution of ShoreTel Presenter for Java

Step 1 Click Show Menu.

The menu is displayed.

Step 2 Select Sharing Size > *resolution value*.

The *resolution value* applies to the conference.

The screen refreshes to the selected resolution.

Images on the desktop are recalibrated to the new resolution.

Participants see the sharing area.

If necessary, resize the presented application to ensure that participants can see an entire image.

All opened applications are automatically resized to the new resolution.

The resolution of the sharing computer is unaffected.

5.6 Adjusting Quality of Shared Image

Presentations requiring frequent screen updates (such as animation) often use large amounts of bandwidth.

Many factors can affect the quality of the image displayed to participants.

Presenter provides options for improving the participant experience, including adjusting the outgoing refresh rate and bandwidth of the sharing source.

NOTE Actual adjustment depends on the input from the source, and can be negligible.

5.6.1 Adjust Outgoing Refresh Rate (Presenter for Windows only)

Step 1 Click Show Menu.

The Show Menu drop-down menu is opened.

Step 2 Select Refresh Rate:

- Low: half the current rate.
- Medium: current rate.
- High: 1.5x the current rate.

5.6.2 Adjust Outgoing Bandwidth (Presenter for Windows & Presenter for Java)

Step 1 Click Show Menu.

The Show Menu drop-down menu is opened.

Step 2 Select Image Quality.

- Low: half the current rate.
- Medium: current rate.
- High: 1.5x the current rate.

C H A P T E R 6

Conference Viewer

6.1 Introduction

The conference viewer allows the host and participants to join and manage conferences.

The host uses the conference viewer to manage the conference.

Participants can use the Web page to interact with the host and view the data shared in the conference.

This chapter provides information about the Web conference page.

Topics include:

- [Host Web Conference Page section on page 97](#)
- [Share Menu section on page 99](#)
- [More Menu section on page 102](#)
- [Participant Panel section on page 106](#)
- [Audio Conference Options section on page 107](#)
- [Participant Web Conference Page section on page 109](#)
- [Sharing section on page 110](#)

6.2 Host Web Conference Page

Figure 6-1 shows the Web conference page of the conference host.

Table 6-1 describes the host Web conference page.

Figure 6-1 Host Conference Viewer

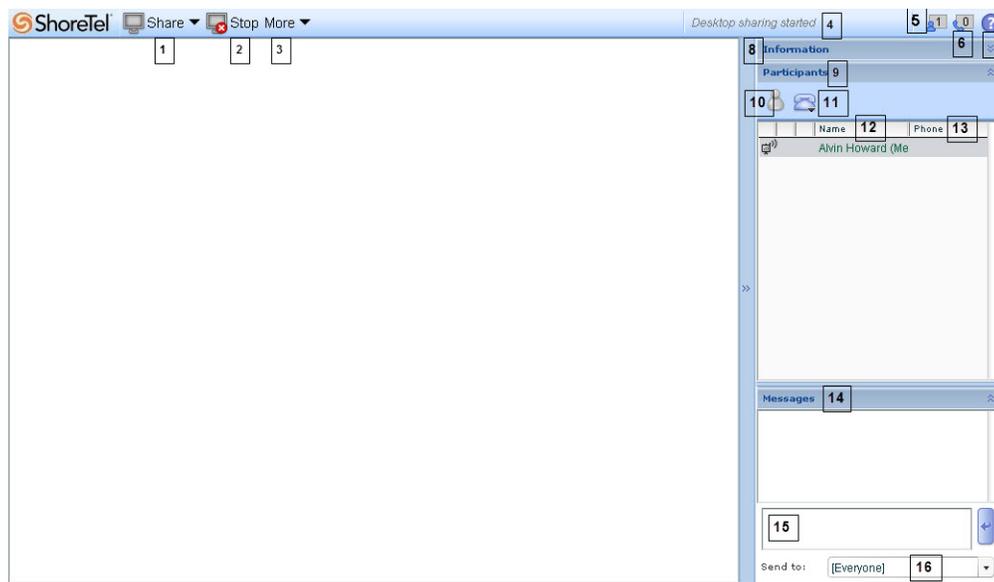


Table 6-1 Host Conference Viewer Details

1	Share	Specify the application to share with conference participants.
2	Stop Desktop Sharing	Stop data sharing without closing Web conference.
3	More	Options for managing conference.
4	Conference Information	Displays conference details.
5	Number of Web Attendees	Participants logged in to Web portion of conference.
6	Number of Audio Attendees	Participants logged in to audio portion of conference.
7	Help	Conference help system.
8	Information	Conference details.
9	Participant	Conference participants.
10	Participant Options	Participant options.
11	Audio Conference Options	Audio conference options.
12	Name	Names of participants.
13	Phone	Phone number of audio participants and caller ID of Web-only participants.
14	Message	Displays text and other messages sent during conference.
15	Message	Enter and send text to conference participants.
16	Send to	Specify participant to send message.

6.3 Share Menu

This menu is available to the host or participants with permission to share.

From here, designated hosts and participants specify what to share with other conference participants.

6.3.1 Display Share Menu

Step 1 Join a conference as the host (or receive permission to present).

The Share menu is displayed on the toolbar.

Step 2 Click Share.

The Share menu is opened (Figure 6-2).

Figure 6-2 Share Menu



Table 6-2 Share Menu Options

Entire Desktop	Launch Presenter and share your desktop with conference participants.
Personal Library	Share material uploaded to your personal conference library.
Shared Library	Share material uploaded to the shared conference library.
Send File	Send a file as a message to conference participants. Participants can choose to open the message or save it.
Whiteboard	Use conference page as a whiteboard. Whiteboard tools are available for the presenter only.
Import Presentation	Import Powerpoint presentations into conference. You must first stop sharing to import the presentation. After a presentation is uploaded, sharing starts automatically.

6.3.2 Share Desktop

Conference participants (including the host) who are presenting can share their desktop.

NOTE To share the desktop, your computer must be running ShoreTel Presenter for Windows or Java Runtime Environment 1.6.0.15 or later.

6.3.2.1 Enable Sharing as a Host

Step 1 Join a conference as the host.

Step 2 Click Share > Entire Desktop, or the sharing button.

After a few seconds, the Presenter frame is displayed around the desktop.

6.3.2.2 Transfer Sharing to a Participant

Unless the conference is configured to allow participants to share when they join, the host must grant share privilege to participants.

When sharing is granted from the beginning of a conference, the host can revoke and restore the share privilege.

Step 1 Join a conference as the host.

Step 2 In Participant, select a participant.

The participant must have a Web connection.

Step 3 Click Participant options.

The Participant options menu is opened.

Step 4 Click Allow presenting.

A dialog is opened on the desktop of the participant noting that the host is granting Presenter control.

The participant must click OK to complete the transfer.

6.3.2.3 Enable Sharing as a Participant

Step 1 If you are granted permission to present, the Share Desktop dialog is opened on your desktop and the Share menu is displayed on your toolbar (Figure 6-3).

Step 2 Click Yes.

NOTE If another participant is currently presenting, a second dialog is opened, identifying the presenter and allowing you to stop the sharing. Click Stop.

The Share Desktop dialog is displayed in the middle of the conference viewer (Figure 6-4).

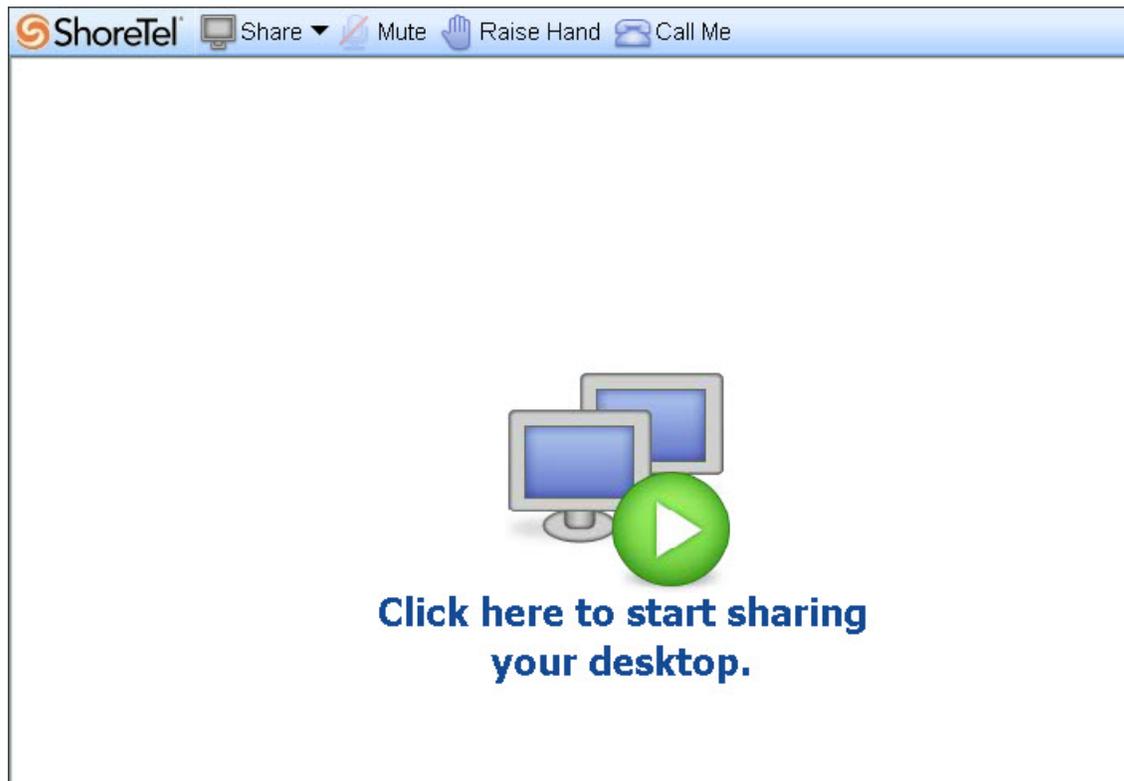
Step 3 Click the start sharing button.

After a few seconds, the Presenter frame is displayed around the desktop.

Figure 6-3 Share Desktop Message Box



Figure 6-4 Share Desktop Command in Participant Browser



6.4 More Menu

This menu is available to the host or participants with permission to share.

From here, designated hosts and participants manage audio participants.

NOTE This menu does not apply to audio callers using ShoreTel Communicator to access the Web page.

6.4.1 Display More Menu

Step 1 Join a conference as the host.

Step 2 Click More.

The More menu is opened (Figure 6-5).

Figure 6-5 More Menu

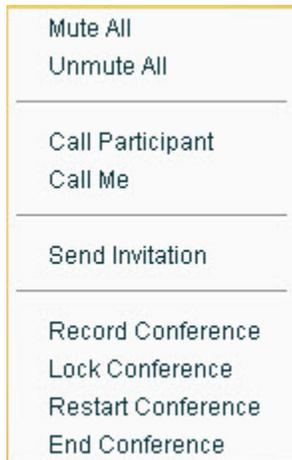


Table 6-3 More Menu Options

Option	Description
Mute All	Place all participants on mute. Host, if present on call, is never muted by this function.
Unmute All	Undo mute.
Call Participant	Dial number of participant to join the audio conference associated with current Web conference.
Call Me	Dial your extension to join audio conference associated with current Web conference.
Send Invitation	Send e-mail invitation to join conference. Invitation includes conference information automatically. You must enter the e-mail addresses of participants.
Record Conference	Record conference.
Locked Conference	Limit conference participants to those already in attendance. Those trying to join locked conferences receive a prompt indicating that conference is closed to new participants.
Restart Conference	Restart the conference. Current members are re-entered automatically. Note: If host service appliance is operating at capacity for Web user when host restarts conference, Web participants are redirected to ShoreTel conference Web portal and receive the error message: "Web capacity is full on this Service Appliance. Please try again later." Participants must manually re-enter Web session.
End Conference	End conference.

6.4.2 Send Email Invitations

The conference host can send email invitations from a conference session.

The invitation uses the ShoreTel email template, which includes dialing and access information for the current conference. Text can be edited. Join a conference as the host.

Step 1 Click More > Send Invitation.

The Send Invitation dialog is opened (Figure 6-6).

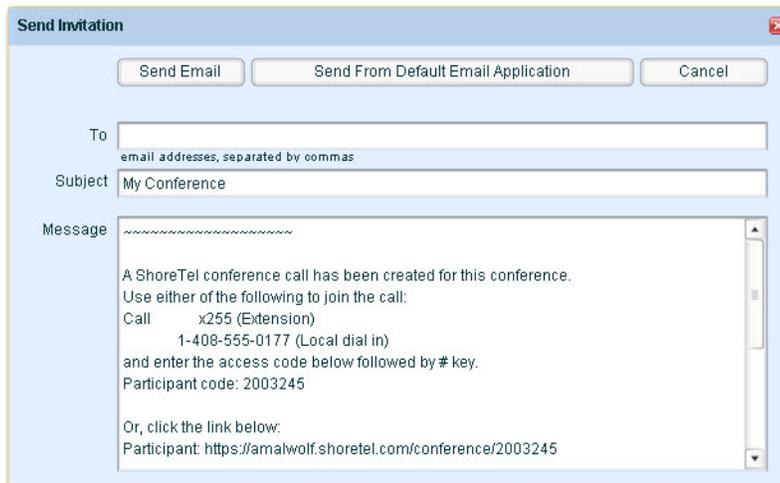
Step 2 Enter email addresses (separate addresses with commas).

Step 3 Enter text.

Step 4 Click Send Email to use the email server of the ShoreTel system to send the email. Or, click Send From Default Email Application to use the default email application installed on the current computer to send the invitation.

Step 5 Click Cancel to close the dialog and discard the email.

Figure 6-6 Send Invitation Dialog Box



6.4.3 Record Conferences

The host can record conferences.

A recording can be started and stopped at any point during the conference, and multiple recordings can be made of the same conference.

Each recording is assigned a recording ID and listed under the recording tab in the Web conference portal for the conference.

Both audio and Web portions of the conference are recorded.

NOTE You can record up to eight consecutive hours in a conference.

6.4.3.1 Start a Recording from a Web Conference Page

Step 1 Join a conference as the host.

Step 2 Dial into the conference, or make sure that someone has dialed into the conference.

NOTE You must stop ShoreTel desktop sharing or any streaming application before you can start recording.

Step 3 Click More > Start Recording:

An audio prompt informs participants that the call is being recorded.

When there is no audio session, a dialog is opened informing you, the host, that only a Web session is being recorded. Even if a caller joins the conference later, the system records the web portion only. Click OK to continue.

When desktop sharing is in progress, a dialog is opened informing you that desktop sharing must be stopped or paused to start the recording. Click OK to stop desktop sharing. After the recording starts, resume desktop sharing.

Step 4 The recording is started.

The Stop Recording button is displayed on the menu bar.

6.4.3.2 Stop a Recording From a Web Conference Page

Step 1 Click More > Stop Recording, click Stop Recording.

The stop recording dialog is opened (Figure 6-7).

Step 2 Click OK.

A confirmation dialog is opened (Figure 6-8).

NOTE When you stop a recording, only the recording is stopped; the audio and Web conference continue.

Figure 6-7 Stop Recording Message Dialog Box



Figure 6-8 Stop Recording Confirmation Message



6.4.3.3 Start and Stop a Recording Using a Phone

A host can start and stop recording using the keypad of a ShoreTel phone.

Both audio and Web portions of the conference are recorded.

Step 1 Join the conference as the host.

Use the host access code when dialing into the conference.

Step 2 On the telephone keypad, press # then 4.

A prompt informs all of the audio participants that the conference is being recorded.

Step 3 To stop the recording, press # then 4.

A prompt informs all of the audio participants that the recording has stopped.

6.5 Participant Panel

This pane shows the names of conference attendees.

The Participant Panel on the host desktop shows how participants joined the conference.

From here, the host can manage participants.

6.5.1 Participant Options

The Participant Options allow the host to manage the Web session of a selected participant. (The participant must have an established Web connection.)

The host can manage desktop sharing and whiteboard use.

The host can also end the Web session of a participant.

Step 1 Log into a conference as the host.

Step 2 In the Participant panel, select a Web session participant.

The Participant Options are enabled.

Step 3 Click Participant Options.

The Participant Options drop-down menu is opened (Figure 6-9).

Step 4 Click an option (Table 6-4).

It is applied to the participant, and the icon for the option is posted next to the name of the participant in the Participant panel.

Figure 6-9 Participant Options Icon Drop-down Menu

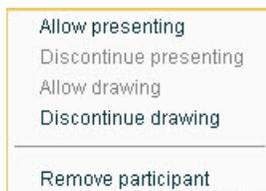


Table 6-4 Participant Options

Allow presenting	Allow participant to present.
Discontinue presenting	End participant presentation.
Allow drawing	Allow participant to use whiteboard. (Host must enable whiteboard first.)
Discontinue drawing	End participant whiteboard use.
Remove participant	Remove participant from conference Web session.

6.6 Audio Conference Options

The Audio Conference Options allow the host to manage the audio portion of the conference for a selected participant.

The host can call members to join the audio session, and manage the audio of a selected participant.

6.6.1 Invite a Participant to an Audio Conference

Step 1 Log into a conference as the host.

Step 2 In the Participant panel, click Audio Conference Options.

The Audio Conference Options menu is opened (Figure 6-10).

Step 3 Click an option.

A dialog is opened (Figure 6-11).

Step 4 Enter the number of the party.

Step 5 Click OK.

The system dials the number.

Figure 6-10 Audio Conference Options Menu

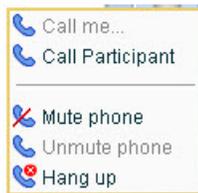


Figure 6-11 Call Option Dialog Box: Call Participant



6.6.2 Manage Audio Connection of a Participant

Step 1 Log into a conference as the host.

Step 2 In the Participant panel, select an audio session participant (as indicated by a phone next to the name of a participant).

Step 3 Click Audio Conference Options.

The Audio Conference Options drop-down menu is opened (Figure 6-9, and Table 6-5).

Step 4 Click an option.

It is applied to the participant.

Table 6-5 provides information about the Audio Conference Options menu.

Figure 6-12 Audio Conference Options Menu

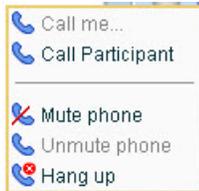


Table 6-5 Audio Conference Options

Call Me	Dial phone number of host to attend audio session of conference.
Call Participant	Dial participant s to attend audio session of conference.
Mute Phone	Mute phone of participant.
Unmute Phone	Unmute phone of participant.
Hang up	Hang up phone of participant.

6.7 Participant Web Conference Page

Figure 6-13 shows the Web conference page of the conference host.

Table 6-6 describes the host Web conference page.

Figure 6-13 Web Conference Page for Participant with Share Capability

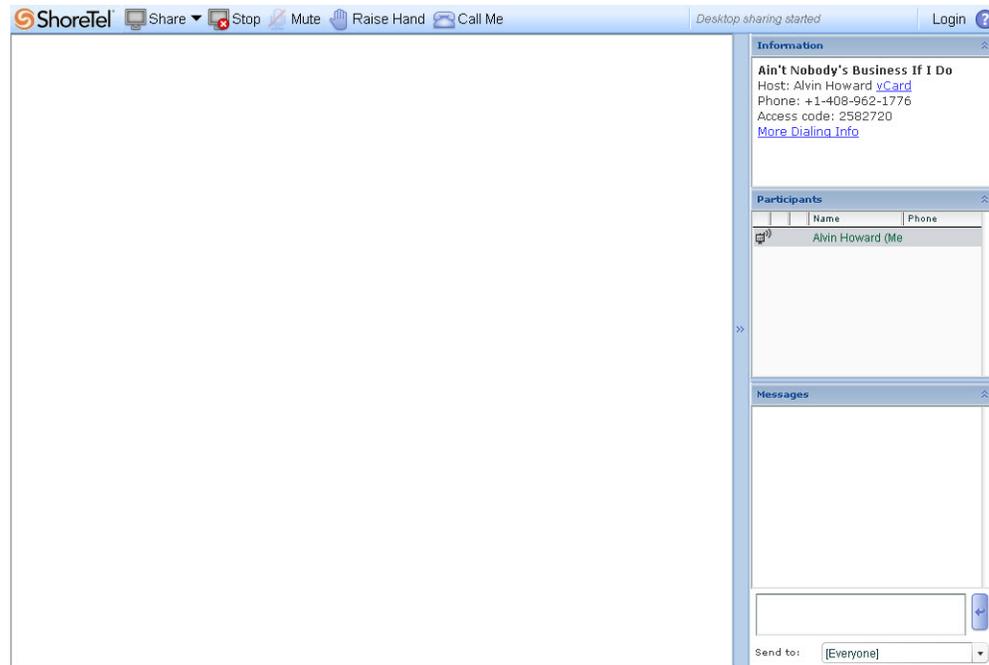


Table 6-6 Web Conference Page for Participants with Share Capability

Share Menu	Allows host to specify application shared with conference participants. Available only when host grants permission to participant to share desktop.
Stop Desktop Sharing	Stops sharing, without closing Web conference. Available only when host grants permission to participant to share desktop.
Mute	Mute phone.
Raised Hand	Draw host's attention.
Call Me	Conference dials participant phone number.
Conference Information	Displays information about conference.
Login (into Web portal)	Take host control of your own conference
Help	Help system.
Information	Information about conference and host.
Participant	Lists conference participants and shows status participant participation.
Name	Participants names.
Phone	Lists phone numbers of audio participants and caller ID of Web-only participants.
Message (pane)	Displays text and other messages sent during conference.
Message (field)	Enter text sent to conference participants.
Send to	Name of conference participant.

6.8 Sharing

6.8.1 Download Library File for Conference

Conference presenters can download files stored in the ShoreTel Web conferencing library to share with participants. The files can reside in your personal library or the shared library.

Step 1 Join the Web session of a conference.

NOTE If you are not the host of the conference, you must sign in to access files in your personal library. You are reconnected to the conference with a new status.

Step 2 Obtain presenter privilege.

The Share menu is opened on your conference viewer.

Step 3 Click Share.

The Share menu is opened.

Step 4 Click the library type.

NOTE If you are not the host, you must sign into the conference before the Personal Library option is opened.

Step 5 Click a file.

The file is opened and is displayed in the conference viewer.

6.8.2 Send a File

You can send a file to participants for viewing or downloading at their convenience during the conference.

Step 1 Join a conference and secure share privileges.

Step 2 Click Share.

The Share menu is opened.

Step 3 Click Send File.

The Select a file to upload dialog is opened.

Step 4 Select a file.

Step 5 Click Open, Download, or X.

Open: file is opened on the computer.

Download: file is downloaded to current computer.

X: Dialog is closed.

NOTE You can access the file any time during the conference by clicking the link.

6.8.3 Importing Presentations

- The Import Presentation option allows you to import PowerPoint files into the whiteboard. From there, you can mark presentations in real time.
- When a PowerPoint file is imported, the slides are transferred to the whiteboard in the conference session.
- The whiteboard tools are displayed with presentation slides on the conference page.
- The conference toolbar is modified to allow you to select a PowerPoint slide for display.
- All participants can use whiteboard tools to select and mark displayed slides.
- Modifications made to the slides using the whiteboard tools are retained as long as the conference is in session.
- The presenter can import multiple PowerPoint files for a single conference session.
- The names of the files imported by the presenter are listed in the Share menu of the presenter only.
- Only one file at a time is loaded for viewing into the conference viewer.
- Files can be used as long as the conference is in session, even if the presenter leaves.

6.8.3.1 Import and use PowerPoint File in Web Conference Session

Step 1 Join a conference and secure share privilege.

Step 2 Click Share.

The Share menu is opened.

Step 3 Click Import Presentation.

The Select File dialog is opened.

NOTE You may be prompted to stop desktop sharing. If so, click OK; click Stop (on the toolbar); then click Share > Import Presentation.

Step 4 Select a PowerPoint file.

PowerPoint is launched in the background on the computer and the presentation slides are loaded and integrated into the whiteboard in the conference session (Figure 6-14).

NOTE After the slides are loaded, you can close the PowerPoint application.

When multiple PowerPoint presentations are uploaded, the presenter must select the file as follows: Click Share, then select the file.

Select a Single Slide for Display

- Step 1 On the toolbar, navigate to the slide select.
- Step 2 In the page field, click and select a page.
The page is displayed.

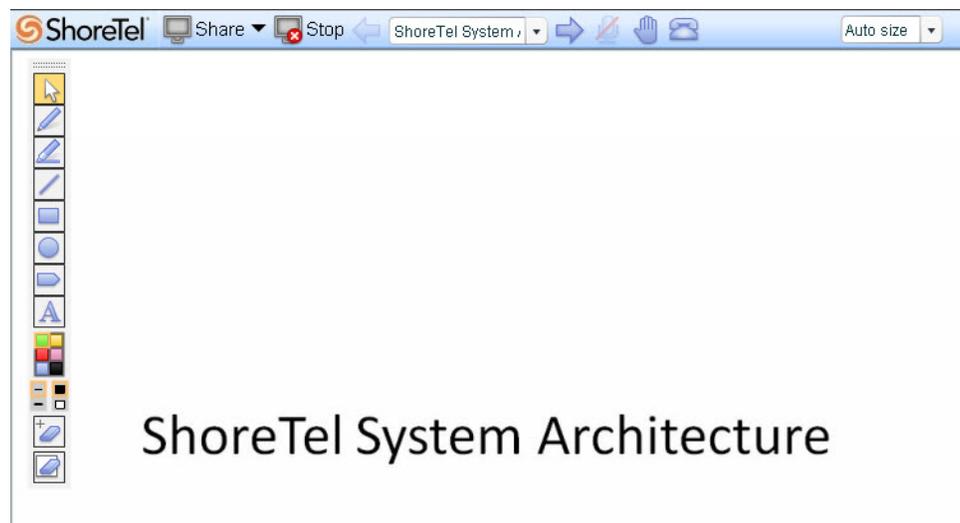
Using the Whiteboard

- Step 1 Click a whiteboard tool.
- Use the tool.

Adjust Size of Presentation

- Step 1 Click Size on toolbar (on right side of the page).
- Step 2 Select a page size.
The view on your computer is adjusted.

Figure 6-14 Integrated Web Conference Page with Whiteboard and PowerPoint Slide



C H A P T E R 7

Instant Conference

7.1 Introduction

Install one of the following on ShoreTel Communicator computer for presentation:

- ShoreTel Presenter for Windows
- Java Run Time Environment 1.6.0.15 or later

7.1.1 Set up Data Collaboration Session

Step 1 Establish a call with ShoreTel participants.

Step 2 Call participants launch ShoreTel Communicator on their computers.

Step 3 One user, the host, clicks the Start Instant Conference icon on the bar in Communicator showing the call as shown in Figure 7-1. (You can also click Call > Start Instant Conference on the toolbar.)

A link for the conference appears in the call cell as shown in Figure 7-2. The link shows the Web address and the conference ID number. Also, if configured to do so (the default value), the link is automatically activated on all participant machines and the conference viewer is launched as shown in Figure 7-3.

NOTE If the ShoreTel conference viewer does not automatically appear, click the link to launch it.

Step 4 Click the start button in the conference viewer to start desktop sharing. Control of the desktop can be transferred to another user at any time.

The Launch Application dialog box appears as shown in Figure 7-4.

Step 5 Do one of the following:

- Click VPresent to share your desktop.
- Click Choose button to select the application that you want to share.

Click OK. ShoreTel conference presenter launches. The conference presenter appear as thick border that encases your desktop or the application you select as shown in Figure 7-5. The conference presenter appears in the Web page that is launched when participants join the Web conference.

NOTE The desktop or application that you are sharing is encased in a thick border with four buttons at the top center. The buttons allow you to

pause sharing, close sharing, show the share menu, and choose a specific window to share.

Figure 7-1 ShoreTel Communicator with Start Instant Conference Icon



Figure 7-2 ShoreTel Communicator with Conference Web Link



Figure 7-3 ShoreTel Communicator Conference Viewer

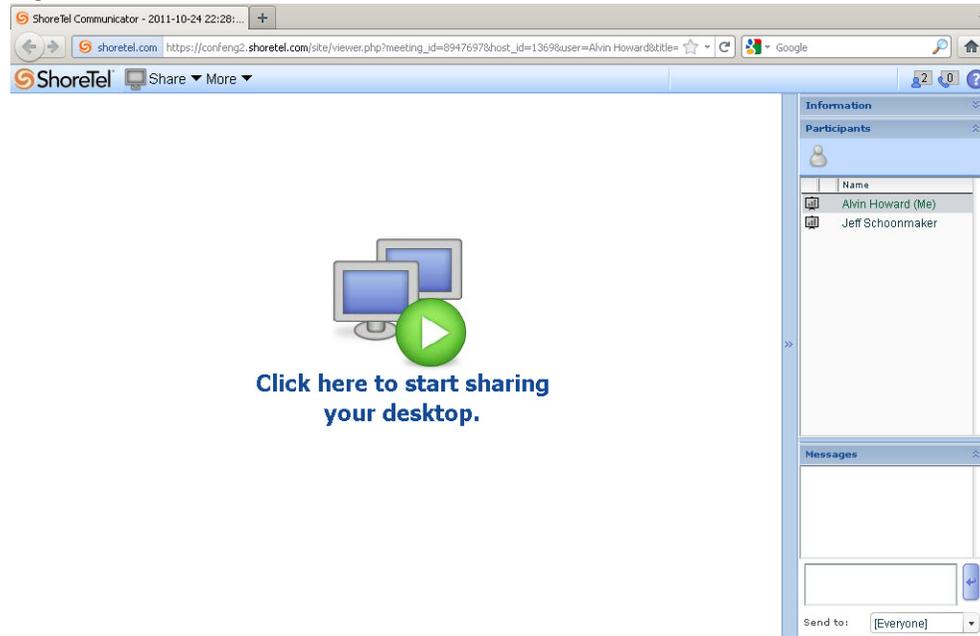
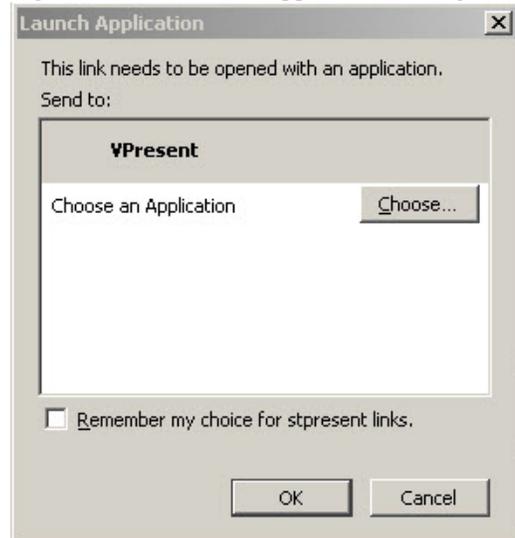
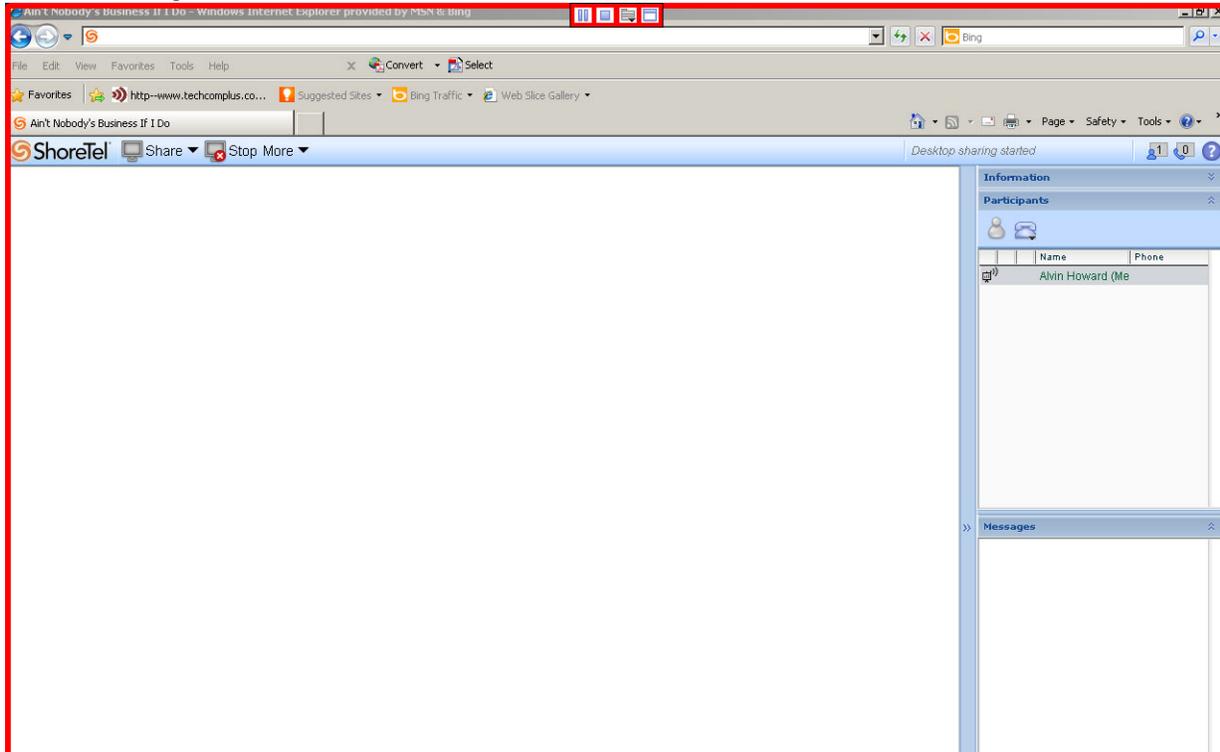


Figure 7-4 Launch Application Dialog Box



NOTE Check “Remember my choice for stpresent links” to save time and avoid security dialog from browser.

Figure 7-5 Viewer Frame



reminders:

- Instant Conference do not show up in the web portal
- recording only gives web portion and never audio
- there is no way to call into an instant conference

C H A P T E R 8

Microsoft Outlook Integration

8.1 Introduction

ShoreTel conferencing integrates with Microsoft Outlook 2007 Calendar and Microsoft Outlook 2010 Calendar to allow you to create and post ShoreTel conferences in the Microsoft Outlook calendar.

This chapter describes how to install the ShoreTel module in the Microsoft Outlook calendar and how to use the module to create and access ShoreTel conferences.

Topics include:

- "Integrating with Microsoft Outlook Calendar"
- "Creating a Conference in Outlook"
- "Joining a Scheduled Conference from Outlook"
- "Delete Conference Component from Outlook Meeting"
- "Changing Conference Settings in Outlook"
- "Integrating with Microsoft Outlook Calendar"

8.2 Integrating with Microsoft Outlook Calendar

Step 1 Close Microsoft Outlook.

Step 2 Launch ShoreTel Communicator.

Step 3 On the toolbar, click Tools > Options (or, click the ShoreTel logo and select Options in the drop-down menu).

The Options and Preferences window is opened.

Step 4 In the menu, click Outlook.

The Outlook page is opened (Figure 8-1).

Step 5 In the Calendar section, click Install.

NOTE If Outlook is open, the Shutdown Application pop-up is opened. You can close Outlook or leave Outlook open. Click Ignore. If Outlook is left open, you must close and re-open it for the install to take effect. When Outlook is re-opened, the ShoreTel Conference application is displayed on the toolbar of the Action tab in the Microsoft Calendar.

Figure 8-1 Options and Preferences Window with Calendar Install Option

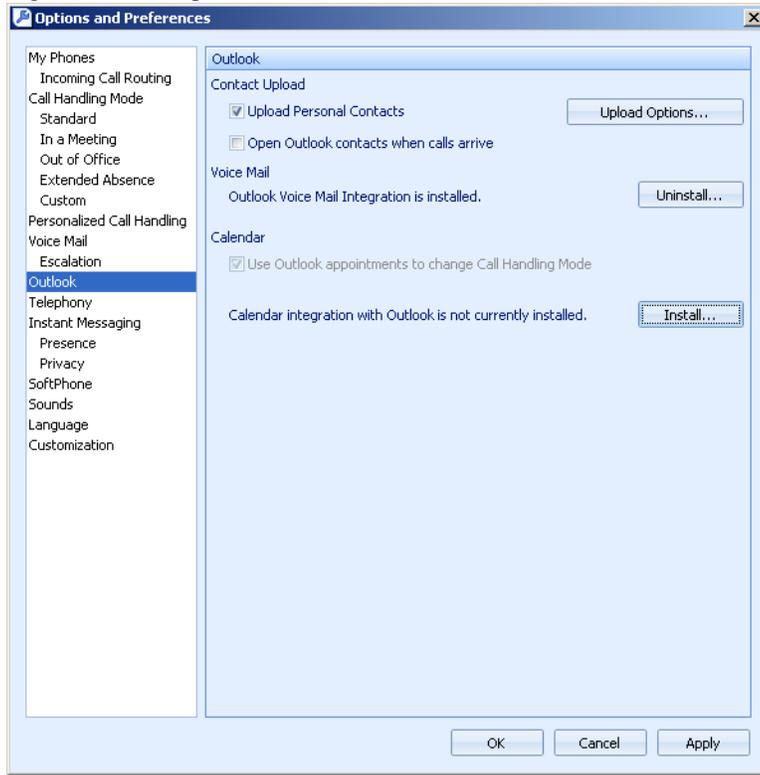
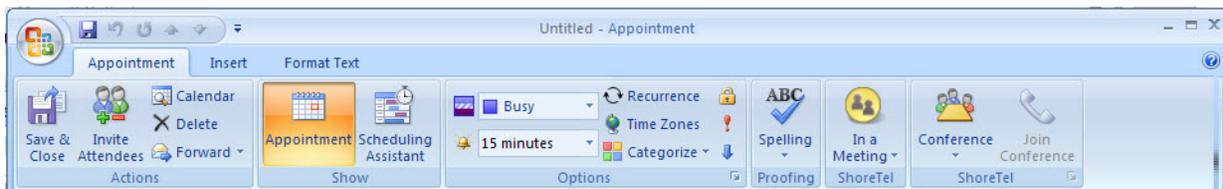


Figure 8-2 Microsoft Calendar Appointment Tab with ShoreTel Conference Application



8.3 Creating a Conference in Outlook

Two types of conferences can be scheduled in Outlook:

- One-time appointments that occur on a single date and time.
- Recurring appointments that occur over a period of time.

NOTE Conferences created in Outlook that have a duration of more than eight hours are displayed in the ShoreTel conference Web Portal with a duration of eight hours.

8.3.1 Create a Conference on ShoreTel Service Appliance in Microsoft Outlook

Step 1 Launch Microsoft Outlook.

Step 2 In the navigation bar, click Calendar.

Step 3 In the menu bar, select Action > New Appointment
A blank Appointment window is opened.

Step 4 Set the parameter for the meeting.

Step 5 Click Conference (in ShoreTel application listing).

Step 6 Click Create.

A ShoreTel conference is created with a unique conference ID.

The conference ID, dial-in number, and other conference information is included in the e-mail message sent to invitees and in the calendar posting created when the message is sent.

Step 7 Click Send.

Conferences created in Outlook are displayed in the ShoreTel conference Web portal. These conferences cannot be modified or deleted using the ShoreTel conference Web portal.

Recurring conferences created in the ShoreTel conference Web portal are not displayed in the Outlook calendar.

8.4 Joining a Scheduled Conference from Outlook

- Step 1 Launch Microsoft Outlook.
- Step 2 In the navigation bar, click Calender.
- Step 3 Double-click a listed meeting.
The Meeting window is opened.
- Step 4 Click Join Conference (in the Outlook ribbon).
An Internet browser is launched, and the Web page for the conference is opened.
The Audio Conference dialog is also opened, showing the dial-in number and access code for the conference.
- Step 5 Click More Dial Info.
The in-house extension for conferences is listed.
The external phone number for the conference is also listed.
These numbers connect you to the audio portion of the conference.
- Step 6 If you are the conference host or presenter, click Start to share your desktop.

8.5 Delete Conference Component from Outlook Meeting

You can remove a conference without deleting the meeting from Outlook.

8.5.1 Delete Conference from Outlook

- Step 1 Launch Microsoft Outlook.
- Step 2 In the navigation bar, click Calender.
- Step 3 Double-click a listed meeting listing.
The Meeting window is opened.
- Step 4 Click Conference (or click the ShoreTel icon then click Delete).
The meeting is deleted from the conference schedule but remains in Outlook as a meeting.

8.6 Changing Conference Settings in Outlook

The following settings can be specified:

- conference ownership and access
- conference starting points
- conference record commentators
- password entry
- participant entrance and exit signals

8.6.1 Set Conference Parameters

Step 1 Launch Microsoft Outlook.

Step 2 In the navigation bar, click Calendar.

Step 3 Double-click a listed meeting.
The Meeting window is opened.

Step 4 Click ShoreTel Conference.
A drop-down menu is opened.

Step 5 Click Settings.
Conference Settings window is opened (Figure 8-3).

Step 6 Enter Host Code.

Step 7 Enter Participant.

Step 8 Enter My extension (ShoreTel extension of the Host).

Step 9 Click Advanced Options.

Step 10 Select conference parameters (Table 8-1).

Step 11 Click OK.

8.6.1.1 Conference Parameters: Notes

Note 1

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 the date or time), because it is considered a reservationless conference. (Outlook prompts, “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 (for example, time or day of week) is applied to the entire series in the ShoreTel Conference Web Portal, even though Outlook reflects only the change to the single occurrence.

Note 2

When a recurring meeting is scheduled through Outlook, it is displayed in the ShoreTel Conference Web Portal under the Reservationless conference list.

If a recurring meeting is later changed into a scheduled meeting, the meeting is not moved to the Scheduled Conference list, even though the meeting type is different.

Note 3

If you do not want to change the entire series or display a meeting appear in an incorrect meeting list, delete and then recreate the meeting with the correct details or meeting type.

Note 4

Changes to the options do not take effect while the conference is in session.

You must stop/start a conference for options to take effect.

Outlook created cons cannot be edited by the Web Portal.

Figure 8-3 Conference Settings Window with Advanced Options Expansion

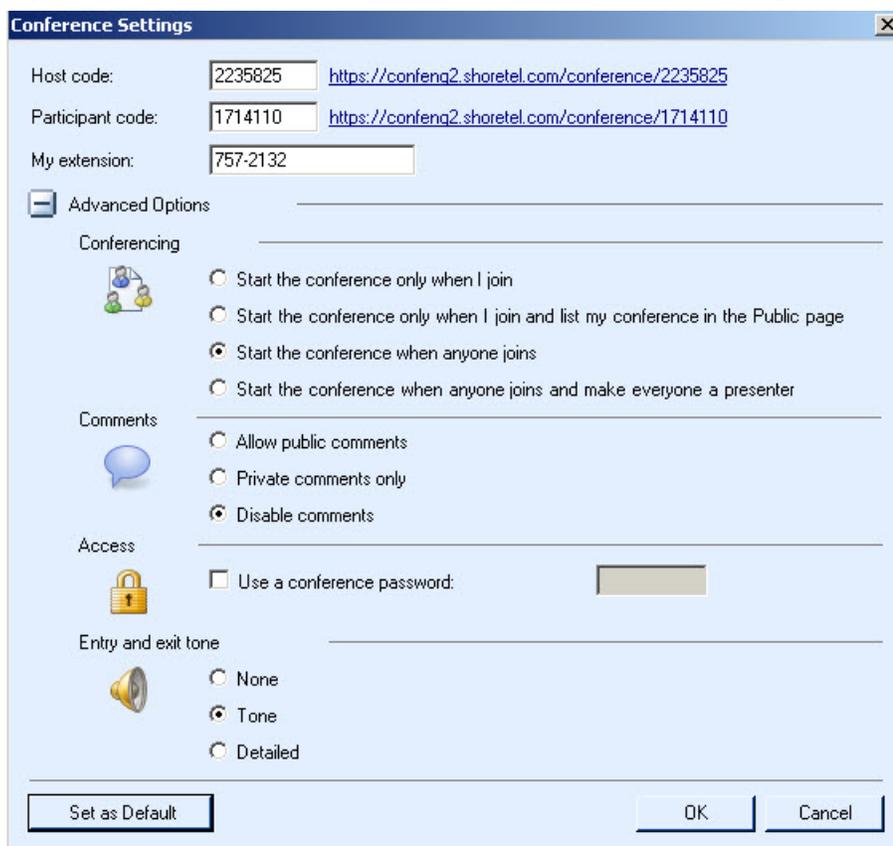


Table 8-1 Conference Settings Options

Conferencing	
Start the conference only when I join	Conference starts after you, the host, join. Participants who dial in early are put on hold until you join conference.
Start the conference only when I join and list my conference in the Public page	Conference starts after you, the host, join. Conference is listed under your name in conference Web page on Public tab.
Start the conference only when anyone joins	Conference starts after someone dials in. NOTE: For security, do not make conferences with these settings public.
Start the conference when anyone joins and make everyone a presenter	Conference starts after someone dials in, and any participant can present. NOTE: For security, do not make conferences with these settings public.
Comments	
Allow public comments	Anyone can make conference comments.
Private comments only	Participants must send comments to host for inclusion in conference comments.
Disable comments	No comments allowed.
Access	
Use a conference password	Participants must use a password to enter conference. Enter password for participants.
Entry and exit tone	
None	No tone is used to indicate participant entry or exit.
Tone	Tone is used to indicate participant entry or exit.
Detailed	Participant is prompted for name when entering or exiting.

8.7 Uninstalling ShoreTel Calendar Integration Tool in Outlook

The calendar integration tool in Microsoft Outlook does not schedule conferences when the user is switched from a ShoreTel Converged Conferencing bridge to a ShoreTel Service Appliance.

In order to re-enable the conference scheduling feature after such a switch, you must uninstall then re-install Outlook Calendar integration.

8.7.1 Uninstall Integration with Outlook Calendar for ShoreTel Converged Conferencing

Step 1 Launch ShoreTel Communicator.

Step 2 On the toolbar, click Tools > Options (or click the ShoreTel logo and select Options in the drop-down menu).

The Options and Preferences window is opened.

Step 3 Click Outlook.

Under Calendar, click Uninstall.

NOTE If Outlook is open, the Shutdown Application pop-up is opened. You can close Outlook or leave Outlook open. Click Ignore. If Outlook is left open, you must close and re-open it for the uninstall to take effect.

When Outlook is re-opened, the ShoreTel Conference application is no longer displayed on the toolbar of the Action tab in Microsoft Calendar.

A P P E N D I X A

Telephone Commands for Audio Controls

Table A-1 Telephone Command Key Sequences

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	
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

