



ShoreTel Converged Conferencing V7.1 User Guide

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What is ShoreTel Converged Conferencing?

ShoreTel Converged Conferencing is a communications solution that combines presence-aware instant messaging with the ability to make phone calls, conference calls, and share applications and presentations. ShoreTel Converged Conferencing runs in a standard Web browser and does not require you to install any special software on your computer.

To use ShoreTel Converged Conferencing, you create a list of contacts, that is, other people who use ShoreTel Converged Conferencing. You can then send an instant message or place a phone call to each contact by double-clicking one of the icons that appear next to each contact's name.

By using ShoreTel Converged Conferencing you can...

- Make phone calls and conference calls.
- Change an instant message into a phone call.
- See who is online and who is on the phone.
- View logs of past messages and phone calls.
- Share your desktop or applications with others.
- Make presentations and upload attachments.
- Control who can see when you are online and who you can send messages to.

This Quick Start Guide helps you start with some of the most basic ShoreTel Converged Conferencing tasks, including adding contacts, making phone calls and conference calls, sending instant messages, and sharing documents and presentations.

Use the Converged Conferencing online help for comprehensive end user information.

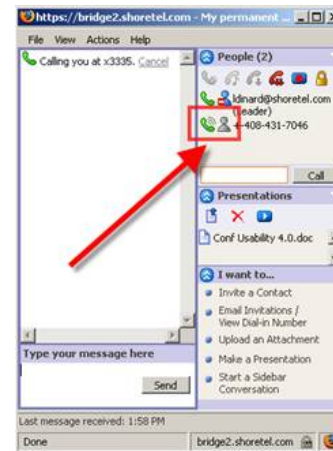
What's new in this release?

Active talker

The participant view is enhanced to provide a visual indication of who is speaking during a call. An indicator is presented next to the participant that is currently speaking in the participant list. This feature is especially useful in

larger conference where the host needs to mute a specific caller with a noisy background.

Active Talker is disabled by default. To enable Active Talker, contact your System Administrator.



3 step scheduling

A new 3 step form permits users to easily configure a new conference.

Simplification of the personal options

The personal options in the Console are much easier to understand.

Automatic display of shared document or application/desktop

Attendees are presented with the shared information as soon as they log into the conference without having to click on a link as with the previous version.

Conference invitation options

The personal options allow selecting an email format or calendar appointment format among 4 different email contents.

[Hiding of participants](#)

When scheduling a conference, you can prevent participants to see/IM each other. In that case, the leader is the only one sees the entire participant list.

[Add Contacts from the Converged Conferencing Database](#)

Today, users can be added to the contact list either directly or via a search of the Outlook/Exchange directory. Sometimes however, the name configured in the server is different from the email address. With this release, names can be added to the contact list from the server's configured users.

[Localized Date and Time](#)

Extended date/time formats are introduced in support of regional (i.e. multiple location deployments).

[Confirmation of callbacks](#)

This feature makes it harder for people to accidentally add their voice mailbox to a conference call. When attendees join a conference by having the system call them back, they will have to press 1 to confirm that the correct number has been reached. If the call is not answered, if it is busy, or if is answered by voicemail, the call will not be connected to the conference. To enable this feature, open the **Conference Details** page by double-clicking on a conference. Select **Conference Features**, and then select the checkbox that says **Confirm Callbacks** with a key press.

[Start/Stop recordings using touchtone](#)

Now, you don't have to be at your desk to record a conference call. If you are a conference leader, you can dial ##4 from your touchtone phone to start or stop a recording. The recording will be stored in the account of the person who owns the conference.

[Dial out with prompt](#)

This feature allows conference leaders to place outgoing calls in a way that people who are already in the conference do not have to hear the call as it is placed. If you select the **Dial Out with Prompt** option, the called party will hear a voice prompt that says, "You have been invited to a conference. To join, press 1. To decline, press 2". People who are already in the conference will not hear anything until the new person has accepted the invitation. If the call is not answered, if it is busy, or if is answered by voicemail, the call will not be connected to the conference.

You can enable this feature in the People panel of the conversation window. Open the panel menu by clicking on the triangle in the upper right corner, and select **Dial Out with Prompt** from the menu. When you place an outgoing call, the call leg will appear in the People panel. You will not hear anything until the called party joins the conference.

Getting Started

Sign into ShoreTel Converged Conferencing

1. Open a browser window.
2. In the Address field, type the URL for the ShoreTel Converged Conferencing application provided by your system administrator.

Important! If you have enabled a pop-up blocker in your browser, you must set it to allow pop-ups for Converged Conferencing.

3. Enter the user ID and password that your system administrator provided and click **Sign In**.
4. Via IE click Favorites and then click on Add to Favorites to add ShoreTel Converged Conferencing to your IE Favorites

Important! To receive instant messages, you must leave your contact window open, even if it is minimized.

Automatically starting ShoreTel Converged Conferencing

If you use Microsoft Internet Explorer on Windows, you can add ShoreTel Converged Conferencing to your **Start** menu so that ShoreTel Converged Conferencing automatically starts when you start Windows:

1. Sign in and start ShoreTel Converged Conferencing as described above.
2. On the first window that opens, move your mouse to the icon in the Address bar (see red circle on next graphic), click and drag the window to your **Start** menu. The **Start** menu will open within a couple of seconds.



3. Drag the icon to **All Programs** (wait for it), then drag the icon to **Startup** and release the ShoreTel Converged Conferencing icon into the **Startup** folder.

Creating a desk top shortcut to ShoreTel Converged Conferencing

Note: If launching ShoreTel Converged Conferencing via a desktop shortcut closes your current active IE window...this is configurable via IE6 settings. The IE setting is found by clicking on – Tools – Internet Options – Advanced – Browsing down until you find “Reuse windows for launching shortcuts” - uncheck to have the existing IE window remain active. IE7 is also configurable via “Tabbed Browsing”. Tabbed Browsing is configured through the Tools – Internet Options – General tab.”

1. Open a browser window.
2. In the Address field, type the URL for the ShoreTel Converged Conferencing application provided by your system administrator.

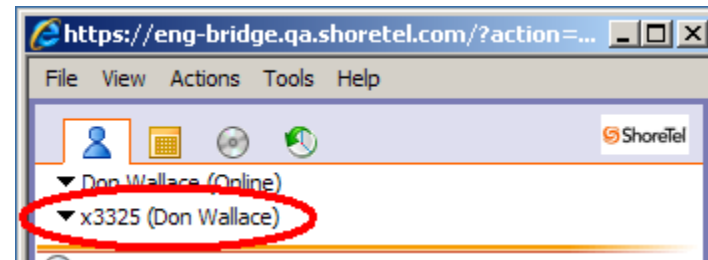
Important! If you have enabled a pop-up blocker in your browser, you must set it to allow pop-ups for Converged Conferencing.

3. Enter the user ID and password that your system administrator provided and click **Sign In**.
4. Drag the ShoreTel Converged Conferencing icon to your Desk Top and release the ShoreTel Converged Conferencing icon. This will create a desk top shortcut to ShoreTel Converged Conferencing.

Important! To receive instant messages, you must leave your contact window open, even if it is minimized.

Learning about your current phone number

The phone number that appears at the top of the main Contacts window is the number you use to make and receive calls.



When you use ShoreTel Converged Conferencing to make calls, this phone number will ring first. When you answer your phone, your outgoing call is placed.

When someone calls you using ShoreTel Converged Conferencing (example: by double-clicking the phone icon next to your name), this number rings. If you keep this number up-to-date, it helps other people to find you.

You can change your number to your cell phone, a conference room, or any place where you want to make and receive calls.

Changing your phone number

1. On the main window click on the phone number at the top of the screen.

2. From the menu provided select what you want to do...
 - **Add a New Number**
Provide the information requested and click **OK**
 - **Edit Numbers (New, Edit, Remove, or Set as Current Number)**
Provide the information requested and click **Save and Close**

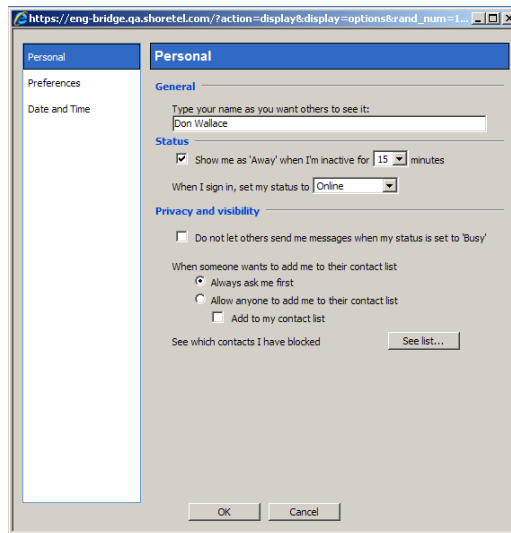
- Email Invitations
- Phone Calls
- Presentation and Application Sharing

Date and Time Options:

- Date Format
- Time Format
- Date and Time Format

Set Personal Preferences

1. On the main window click on **Tools** and from the menu provided click on **Options** and the following screen will appear.



2. Via the **Personal, Preferences & Data and Time** screens presented select you preferences.

Personal Options:

- General
- Status
- Privacy and Visibility

Preferences Options:

- Instant Messages

3. Click **OK**

Conference calls

Call Manager Adhoc Conference Call Setup

Converged Conferencing is a ShoreWare feature that supports calls with a maximum number of participants dependent on the topology of the network and the system configuration. Individual users must be authorized to perform converged conference calls. Consult your system administrator for capacity and authorization information.

Important! You must have accessed/configured your account on the **Conference Bridge** to be able to initiate an **Adhoc Converged Conference call** through that bridge.

Call Manager supports the initiation of a Converged Conference call through a specified Conference bridge account. All other aspects of the call are managed through the Conference bridge user interface.

To specify the Conference Bridge account for making Adhoc Converged Conference Calls:

1. Sign into ShoreTel Call Manager
2. Select **Tools** from the Main Menu bar.
3. Select **Options**.
4. Select **Conferencing** in the menu on the left side of the window.

Note: Consult your system administrator for Conference Bridge logon information.

5. Enter your Conference Bridge user name and password in the data entry fields.
6. Click **Apply**

Call Manager Adhoc Conference Call

To initiate an Adhoc Conference Call through the Call Manager Make New Call panel, perform one of the following:

- Select **Windows -> Conference Manager** from the Main Menu Bar.

OR

- Right click the ShoreTel icon in the System Tray and select **Windows -> Conference Manager**

Either of the above action will cause the Conference Bridge dialog box to appear.

1. From the Converged Conferencing bridge dialog box double click on the first Contact you want included in the Adhoc Conference call.
2. Right Click on the party the you selected in step 1 above
3. Click **Call**
4. Answer your phone and then the 1st party will be called
5. Repeat steps 1 - 3 above until you've added all your conferences
6. Normal Conference Bridge features and functions apply.

Scheduled versus Reservationless conference calls

A **scheduled** conference can usually last anywhere from 30 minutes to one day. You can also add a recurrence to a scheduled conference, so that the access codes would be valid at regular times, such as every Tuesday between 10:00 AM and 11:00 AM.

Access codes for **Reservationless conferences** can be used at any time. Depending on how Converged Conferencing is configured, Reservationless access codes may not expire for several months.

Important! Your account settings may not allow you to create **Reservationless conferences**.


Scheduling a conference call

1. From the **Actions** menu, select **Schedule a Conference**.
2. Enter a name for the conference, and the times when you want the conference to begin and end. You can also enter the number of people you expect to join the audio conference.
3. Click **Next>**.
4. After your conference has been scheduled, you can:
 - Invite others to the conference using email or Microsoft Outlook calendar invitations. Click any of the buttons under **Invitations** at the bottom of the screen.
 - Select conference options on the **Conference Features** tab.

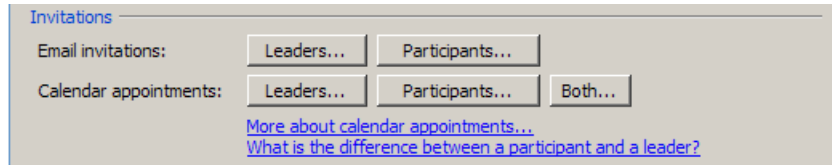
Inviting Conference Attendees

Once a conference has been set up you have several options to invite additional attendees. These invitation options allow you to select an email or Calendar appointment format, with either Leader or Participant access codes or both.


NOTE: How you set up your "Conference Features" will determine the different capabilities for Leader versus Participant access code functions and abilities.

1. From the Scheduled Conferences tab  , double-click the conference you wish to invite additional attendees. A screen included the segment below will appear.
2. Decide on the type of invite (Email invitation or Calendar appointment) you wish to send and then make your selection to include the appropriate Access Codes (Leader, Participant or Both).

3. You can send multiple invites via different means depending on your audience.




Reschedule a Conference Call

1. Select the Scheduled Conference icon 
2. Right click on the schedule Conference Call you wish to reschedule and select **Reschedule or Change Details**.
3. Edit the details as needed and click Ok

Join a scheduled conference call

If you scheduled the conference:

1. From the Scheduled Conferences tab , double-click the conference.
2. Under **Join the Conference**, select whether you want to join both the web conference and the audio conference call, or just the web conference.
3. Click **Join**

Delegate

You may select a delegate who can schedule and manage conference calls for you. When you select a delegate, you empower that person to act on your behalf when it comes to managing your ShoreTel Converged Conferencing account.

Delegate abilities

As a delegate you can do the following things on behalf of someone else:

- Set up conference calls
- View your list of scheduled conferences

- Send invitations to conference calls
- Upload presentations and attachments
- Add people to conference calls that are in progress

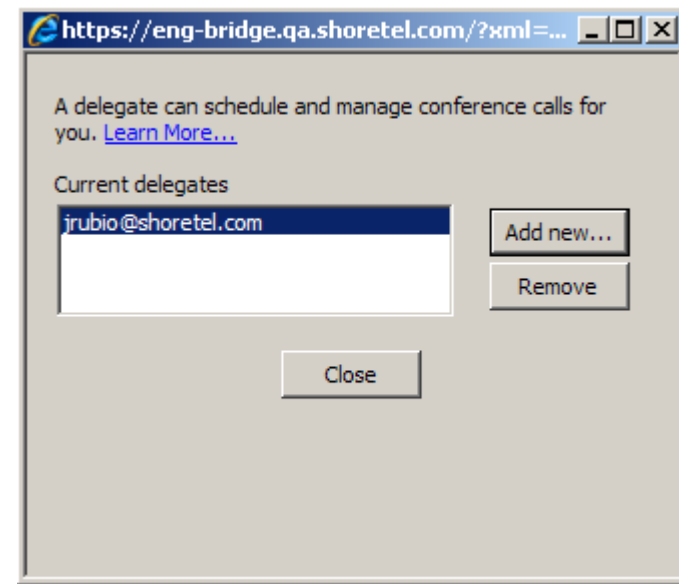
As a **delegate** you will have the option of selecting a different owner(s) other than yourself and will see information for those who have selected you as their delegate.

Select a Delegate

1. In the main window, select **Tools**, then **Delegates**. The window below will appear.
2. Click **Add New** and then enter the user ID of the person whom you would like to name as your delegate.

Note: For User ID format contact your System Administrator or click on Contacts - Add a Contact. In the Add a Contact window enter any letter and click Search, this will provide you User ID example.

3. Click **Submit**.
4. Click **Close** to close your list of delegates.



Remove a Delegate

1. In the main window, select **Tools**, then **Delegates**.
2. Click on the delegate you want to **Remove**
3. Click **Remove**
4. Click **Close**

Invited to attend a conference

You will not see the conference on your Scheduled Conference tab. You will have to join the conference from an email invitation or a Microsoft Outlook calendar appointment (see Outlook Integration). Click the conference link and follow the instructions.

Leading a Conference Call Mute/Un-mute All Participants

To Mute all participants during a conference:

1. During the conference call, right-click on any participant.
2. Select **Mute All Participants**.



To Un-mute all participants during a conference:


1. During the conference call, right-click on any participant.
2. Select **Un-mute All Participants**.

Note: Leaders are NOT muted, only Participants, only Users that logged in using Participant access code.


Note: Users added by Leaders as Ad-Hoc or via Dial Out join as Leaders and will not be muted.

Active Talker - track & mute noisy phones

Active Talker assists the leader by indicating which phone is “noisy” by showing sound waves   Don Wallace coming out of the phone icon. To

turn off this noisy phone simply highlight the noisy phone/attendee and click mute on the  indicated phone.

Mute all participants joining the conference call:

1. Click on the Schedule tab: 
2. Open the Schedule a Conference form:
 - o For a new conference: Under **I want to...**, select **Schedule a Conference**.
 - o For a previously scheduled conference: Double-click on the conference.
3. On the left, select the **Conference Features**.
4. Under **Audio Conference**, select the **Lecture Mode** checkbox.
5. Click **OK**.

Note: Leaders are NOT muted, only Participants, only Users that logged in using Participant access code.

Note: Users added by Leaders as Ad-Hoc or via Dial Out join as Leaders and will not be muted.

Start or Stop recording of the conference call.

1. ONLY conference leader can start or stop recording
2. Press ## 4, you'll hear voice prompts.
3. Press 1, the conference call starts, continues or stops recording
4. Press 2, the call is not recorded, return to the conference call.

Prevent participants from seeing each other

In some conferences, you might want to prevent participants from seeing each other's names or sending messages to each other.

To prevent participants from seeing each other:

1. Schedule a conference call.

2. After the conference is scheduled, select the **Conference Features** page, and then select “**Don't let participants see each other**”.

How many callers can join a conference call?

Scheduled conference may require you to specify the number of callers that you expect will join the audio conference. If more people try to join the audio conference than the number you asked for, they may not be able to join. If there are extra conference ports available when additional people try to join the audio conference, the ports will be given out on a first-come-first-served basis.

You cannot reserve conference ports for **Reservationless** conferences or calls that you make on the spur of the moment (e.g., by double-clicking on the phone icon next to a contact's name). Conference ports for these types of calls are given out on a first-come-first-served basis.

Participating in a conference call, touch-tone options

Mute your line during a conference

Press ## 1, you'll hear two beeps.

Un-mute your line during a conference

Press ## 1, you'll hear three beeps.

Hear a list of names (roll call) during a conference

If enabled for the conference, use roll call to hear the names of the conference participants. The roll call feature prompts participants to record their names as they join the conference. If roll call is not enabled, you hear the number of callers in the call.

1. Press ## 3
2. Press 1 to repeat the list of names or number of callers
3. Press * to stop the listing
4. Press * to return to the conference

Dial out during a conference

1. Press ## 2.
2. Dial the phone number making sure to enter all necessary prefixes, area codes, and/or country codes.
3. Press #.

Keep the new call and return to the conference

1. Press **, you'll hear voice prompts.
2. Press 1 to return to the conference with new call.

Drop the call (if there is no answer) and return to the conference

1. Press **, you hear voice prompts.
2. Press 2, the call is dropped.

Start/Stop recordings

Recording a conference call



Call leaders may make audio recordings of conference calls. If a presentation is made while the call is being recorded, you may watch the presentation as you listen to the recording.

Note: Recordings are stored in the account of the person who owns the conference. This means that if you start a recording it may not be in your account, if you don't own the conference. Also, you may find recordings in your account that you did not make, if a recording was made of a conference that you own.

Who owns the conference?

- For **Reservationless or scheduled conferences**, the owner is the person who scheduled the conference.
- For **spontaneous conferences**, the owner is the first person to start a recording, upload a presentation or request an access code.

Record a conference call from the conversation window

1. From the conversation window, in the **People** panel, click the Recording button (.
2. To end the recording, click the recording button again.
3. For a list of your recordings, click the Recordings tab: 

Record a conference call using your touchtone phone


1. During the conference call, press the pound key twice (##).
2. Press 4 to start or stop the recording.
3. You will be automatically returned to the conference.

Recorded conference call

Converged Conferencing allows the leader to make audio recordings of conference calls and the associated presentation. A leader may watch the presentation as s/he listen to the recording (Application sharing is not recorded). Recordings are available only to the leader who made the recordings and are stored via the leaders account.


Share a recording with others

The leader may send an email message that contains a link to the recording:


1. For a list of your recordings, click the Recordings tab  in the main window
2. Right-click on the recording that you want to share, then select **Email Playback Instructions**.
3. An email message will open that contains a link to the recording.

.Wav files (Recording)


The leader can save a recording as a .wav file:

1. For a list of your recordings, click the Recordings tab  in the main window
2. Right-click on the recording that you want to share, then select **Email Playback Instructions**.
3. An email message will open that contains a link to the recording.

Delete a recording

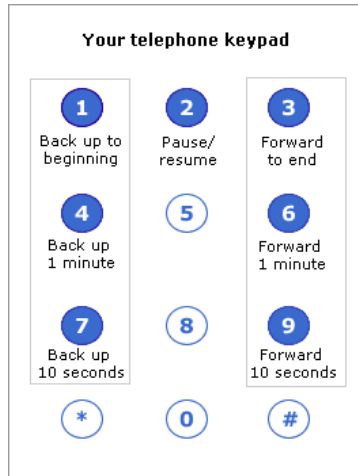
1. For a list of your recordings, click the Recordings tab  in the main window
2. Right-click on the recording that you want to delete.
3. From the pop-up menu click on **Delete**
4. In the dialog window click **OK** to confirm the deletion.

Play back a recording

1. For a list of your recordings, click the Recordings tab  in the main window
2. Double-click on the recording that you want to listen to.
3. Select how you want to listen to the recording:
 - o If there was presentation made, click **Play Presentation**.
 - o To play only the audio portion of the conference call on your computer, click **Play**.
 - o You may listen to the recording over the phone by dialing the phone number and entering the access code shown at the bottom of the screen.

Controlling a recording your listening to over the phone


If you're listening to a recorded conference call through your phone, you may use your telephone keypad to control the playback.



Contacts, creating, adding, groups

Add a contact

Contacts can be added to the Contact list either directly or via a search of the Outlook/Exchange directory. Sometimes however, the name configured in the server is different from the email address. With this release, names can be added to the contact list from the server's configured users

1. On the main window click on the Contact icon 
2. At the bottom of the screen under **I Want to...**, click **Add a Contact**.
3. Select how you want to add the contact:
 - **By user ID:** If another person has a ShoreTel Converged Conferencing account, you should specify their user ID. This allows you to use all available features.
 - **By phone number (speed dial):** If you want to make calls to someone who does not have a ShoreTel Converged Conferencing account, you can add a contact to your list by phone number.
4. Enter the User ID or phone number of the person you'd like to add, and then click **OK**.

5. To search for a contact, enter the first few letters of a user ID and click **Search**.

Set up a contact group


1. In the main Contacts window, from the **Tool** menu, select **Add a Group**.
2. In the dialog box that appears, enter a name for the group and click **OK**.


Add contacts to a group

1. In the main Contacts window, right-click the name of a contact and select **Copy to Group**.
2. In the dialog box that appears, select the group you want, or enter the name of a new group and click **OK**.

Making phone calls and conference calls

Call a contact

1. In either the contact list or a conversation window, double-click the telephone icon  next to the contact's name.

Important! If the phone icon next to a contact's name is red , the contact is on another call. If you call them, you may reach their voicemail.

2. Your phone rings.

Result: When you answer, the system places a call to the contact's current phone number.

Call several people at once

1. From the main contact list, hold down the CTRL key while clicking on the names of the people you'd like to call.
2. Right-click and select **Call** from the menu.
3. Your phone rings.

Result: When you answer, the system places calls, one by one, to all of the contacts that you selected.

Call all contacts in a group

1. From the main contact list, click the name of a group to select all contacts in the group.
2. Right-click the group name and select Call.
3. Your phone rings. **Result:** When you answer, the system places calls, one by one, to all of the contacts in the group.

Call someone who is not on your contact list

1. At the bottom of the main contacts window, under **I want to...**, enter a phone number or user ID next to **Call this number**.
2. Click **Call**, or press **Enter**.

Result: When you answer the phone, a call is placed to the phone number or user ID you entered.

Add someone to an existing call via GUI

From the main contacts window, double-click the phone icon next to the name of a person you want to call.

Result: The new person is added to the existing call.

Add someone to an existing call via touch-tones

Note: Only leaders may place outgoing calls during conference calls.

To place a call during a conference call:

1. During the conference call, press the pound (#) key twice.
2. Press 2 to place a call.
3. Enter the country code and the phone number, followed by pound (#).

Note: All phone numbers, even local ones, must be preceded by the country code. For calls in the United States, Canada, and Caribbean countries, you must dial 1 and the area code.

4. To keep the new call and return to the conference:
 - Press the star (*) key twice.
 - When you hear the voice prompts, press 1 to return to the conference with new call.
5. To drop the call (e.g., if there is no answer)
 - Press the star (*) key twice.
 - After you hear the voice prompt, press 2 to drop the call.

Important! Adding in conferencing parties via Call Manager or via your ShoreTel phone is not a supported method for adding conferencing parties.

Send an instant message

1. In either the main Contacts window or in a Conversation window, double-click the icon next to the name of the person you want.

Important! If the icon is red , the contact is offline and cannot receive messages.

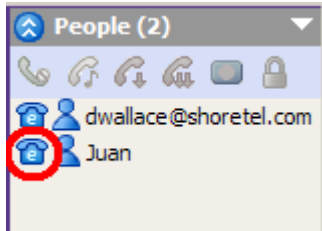
2. In the Conversation window that opens, type your message in the bottom of the window.
3. Press Enter, or click Send.

Turning an instant message into a phone call

In either the main Contacts window or in a Conversation

1. To call a contact that is in an instant message conversation window, double-click the icon next to the person name you wish to call.
2. Your phone will ring
3. Once you answer your phone the system will call the other party.

Important! If the icon is red , the contact is offline and cannot receive messages.



Callback confirmations

Callback confirmations can help prevent conference attendees from accidentally adding their voice mailbox or other inappropriate legs to a conference.

A conference attendee may join a conference by typing a phone number into a web page and then having the system call him or her back. Although this usually works well, problems may occur sometimes. The attendee might enter the wrong phone number, or the call may be transferred to voicemail before the attendee can answer. This results in a voice mail recording joining the conference.

If the callback confirmation feature is enabled for a conference, attendees who join a conference by having the system call them back will hear a voice prompt that asks them to press a key before they are joined into the conference. If a call has been accidentally transferred to voice mail, for example, it will not be joined into the conference because a live human must confirm that the correct number has been reached.

Conference attendees will hear "Welcome to the Converged Conferencing conference center. To join press 1. To decline, press 2."

To enable callback confirmations:

1. Open the **Conference Details** page by double-clicking on the conference.
2. Select **Conference Features**.
3. Under **Audio Conference**, select the checkbox that says **Confirm callbacks with a key press**.

Dial out with prompt feature

Leaders in a conference call may [place outgoing calls to add new people into the conference](#). By default, everybody in the conference will hear the outgoing call as it is placed, while the phone rings and the new person answers the phone.

If you don't want other people in the conference to hear the outgoing call as it is placed, you may select the **Dial Out with Prompt** option. If you select this option, the called party will hear a voice prompt that says "You have been invited to a conference. To join, press 1. To decline, press 2". People who are already in the conference will not hear anything until the new person has accepted the invitation.

If the call is not answered, if it is busy, or if it is answered by voicemail, the call will not be connected to the conference.

By default, **Dial Out with Prompt** is not enabled.

Enable Dial Out with Prompt

1. From the conversation window, in the People panel, open the panel menu by clicking on the triangle in the upper right corner.
2. Select **Dial Out with Prompt** from the menu. When the feature is enabled, a checkmark will appear next to it.
3. When you place an outgoing call, the call leg will appear in the People panel. You will not hear anything until the called party joins the conference.

Sharing an application on your desktop

Use Application/Desktop Sharing to

- Enable others to edit an application file that is running on your computer, such as a spreadsheet, a word processing file, or a diagram.
- Show others a file for consultation and discussion.
- Share your entire desktop.

When another person is viewing your shared application or desktop, you can pass the application control to them and allow them to edit files that are on your computer.

Share an application or your desktop

Note: To share applications or your desktop, you must use a browser that allows ActiveX controls, such as Microsoft Internet Explorer. If you are using Internet Explorer you will have to set your browser security settings so that you can accept an ActiveX downloads, this requires Administrator rights. If you have issues please check with your system administrator, or see your browser's online help for instructions on how to do this.

The first time you sign in to ShoreTel Converged Conferencing, you are prompted to download:

- If you are using Internet Explorer, you click a menu at the top of your browser window and select **Install ActiveX...**
- If you see a box that asks whether you want to install Audio Components, you must respond **Yes**.
 1. Start a conversation with the person or people with whom you want to collaborate.
 2. In the conversation window, under **I want to...**, select **Share an Application**.

If you have not used application sharing before on your computer, you will see a window that asks you to accept the Application Sharing Components. Click **Yes**.

In the dialog box that appears, select the application that you want to share and click **OK**.

The application that you selected is outlined in red while it is being shared.

Use the application sharing toolbar to pause or stop sharing:



View someone else's shared application

Note: You must use a browser that supports either ActiveX (preferred) or Java to view shared applications. (see Index for ActiveX requirements)

1. When someone in a conversation shares an application, a link that says **Show Shared Application** appears in the IM panel of the conversation window. Click this link.



2. You will have to wait a few minutes for the shared application to appear. If you see a dialog box that asks if you want to accept a Java applet, you must respond **Yes**.
3. If the person sharing an application stops sharing and then starts it again, you may have to click the **View Shared Application** link again.

Two people sharing applications at the same time

1. Click the **Shared Applications** tab.
2. If you do not see the **Shared Applications** tab, select **View**, then **Show Presentation**.
3. From the dropdown menu in the upper right corner, select the person whose application you want to view.

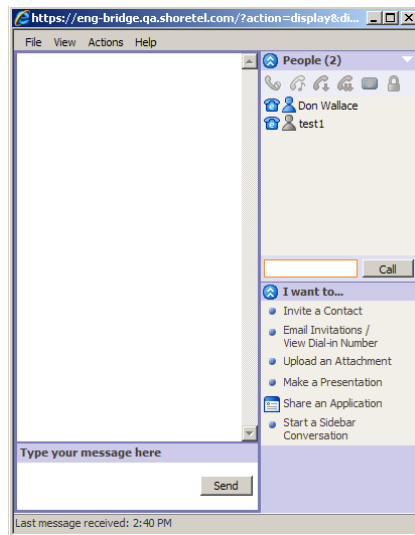
Presentations

Pre-load your presentation

1. To be able to pre-load your Presentation you must have already added at least one Contact (see Contacts, creating, adding, groups)

Note: You need to have entered at least one Contact to be able to pre-load a presentation.

2. Double click on a Contact

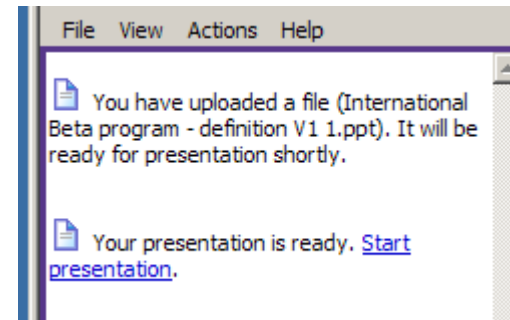


3. In the IM conversation window that appears (above), under **I want to...** click **Make a Presentation**.
4. In the window that opens, use the Browse button to select your presentation file from your computer, and click **OK**.

Note: You may only present Microsoft Word, PowerPoint, or Excel files. The file may take a few minutes to be ready for presentation, so it is advised to you pre-load presentation prior to the meeting.

Show your presentation to others in the conversation

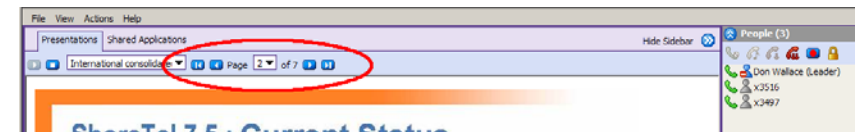
1. Click **Start Presentation** in the IM panel.




2. Your conversation window expands so that you can see your presentation.


Result: If you do not see your presentation, your file may not have finished converting into the Converged Conferencing presentation format. This may take a few minutes.


3. Utilizing the control buttons at the top of the presentation screen or standard scrolling capabilities you can move forward or backwards through a PowerPoint slide show or work document.



4. Use the Stop button  to close the presentation
5. If others do not see your presentation, ask them to click the **View Presentation** link in the IM panel.

Attach a file to a conversation

1. In the conversation window, under **I want to...** open the **Slides & Attachments** panel on the right side of the screen.
2. Click **Upload**. 
3. Use the Browse button to select a file from your computer.
4. Select the **Attachment** option button, and click **OK**.

Result: After the file is uploaded, all participants see the resultant file in the **Slides & Attachments**  panel. If the file does not appear, try clicking the **Refresh** icon.

Save an attachment to your computer

1. After someone uploads an attachment, a link (**Right-click to save to your computer**) appears in the instant message panel of the conversation window.



2. Right-click the link and select **Save Target As...**, or **Save Link Target As...** (Depending on your browser). On a Macintosh, hold down the Control key while you click the file name, and then select **Save Link Target As...**
3. Select the location where you would like to save the file, and click **OK**.

Control a presentation


If you control a presentation, you can:

- Select which file to present (if you uploaded more than one file for presentation).
- Navigate through PowerPoint slides.

Presentations may be controlled by anyone with leader privileges. Participants may not control presentations.

1. If you haven't already, start the presentation.
2. On the Presentation tab, use the toolbar controls to:
 - Start or stop the presentation
 - Select the file for presentation
 - Navigate through PowerPoint slides

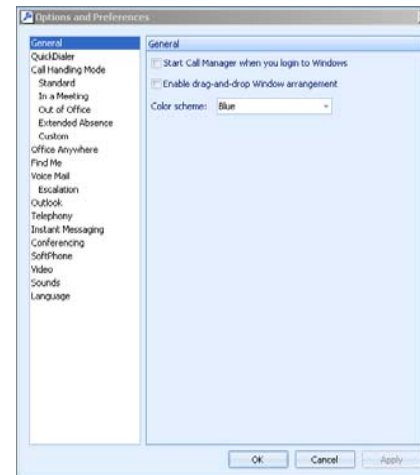
Delete your presentation

1. In the conversation window, open the **Presentations** panel on the right side of the screen.
2. Select the presentation that you want to delete.
3. Click the Delete icon () at the top of the panel .

Outlook Integration

Installing the Outlook Plug-in

1. Close Outlook
2. Open your ShoreTel Call Manager
3. From ShoreTel Call Manager click on **Tools**, then click on **Options**, the following screen will appear.



4. Within the Options and Preference screen click on **Outlook**
5. Under Calendar within the Options and Preference screen check **Calendar** and then click **Install**.
6. You will need to obtain the URL to your ShoreTel Converged Conferencing server from your conference bridge Administrator

Schedule a Conference Call via Outlook

1. Prerequisite - complete the “Installing the Outlook Plug-in” described above.
2. Obtain the URL to your ShoreTel Converged Conferencing server from your CC Administrator
3. Open **Outlook**
4. Within Outlook click on **Calendar**
5. Click on **New** (create a new calendar appointment)

Note - there are two new tabs (Call Handling Mode & Conferencing)

6. Follow standard Outlook steps for creating a new appointment, completed needed fields for the **Appointment & Scheduling** tabs.
7. Via the **Call Handling Mode** tab select how incoming calls are to be handled during this appointment period.
8. Select **Conferencing** tab
9. Check “**This appointment includes a ShoreTel conference call**”, the following window will appear.

10. When scheduling your first Outlook Converged Conferencing call you will need to enter the URL for your Converged Conferencing Bridge, obtain this from you CC Administrator.

11. Select which **access codes** you want included with the appointment...Leader only, Participant only or both.
12. Select if the Leader is required to start the conference call.
13. Select if you want or don't want to have the system announce participants' names.
14. Click **Send**, an email is sent to the Conference particulars.
15. Your Conference is set up

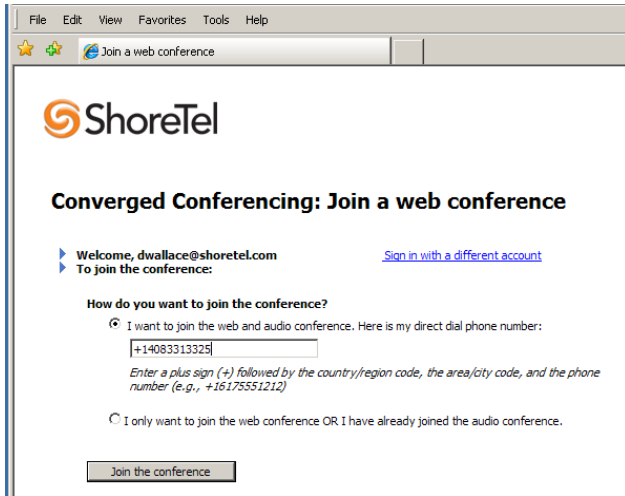
Important! If changes are required Outlook will **NOT** automatically update the time, date, nor other changes you make to a scheduled appointment/conference. You must delete the original conference and reschedule the conference via Outlook

Important! All meetings will be scheduled in the same time zone as the Converged Conferencing server **NOT** as specified in Outlook.

Participating in a Conference Call set up in Outlook

1. Via Outlook Calendar open the schedule appointment that includes a conference call, a screen similar to the below example will appear.

2. There are two methods for joining the conference call...
 - Dial the provide telephone number and enter the needed access code
 - Click on the URL link provided and the following screen will appear



3. There are two options for joining the conference call...
 - The system can call you...provide the phone number you want the CC system to call you at and click **Join the Conference**
 - Select “I only want to join the web conference OR I have already joined the audio conference and click **Join the Conference**

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