


# COLLABORATION USER GUIDE – UNIVERGE 3C

## Creating a Meeting

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- Open the UC Client
- Click on the Collaboration tool  This will open internet explorer
- Click Create New Meeting
- Select if this will be a private (42 people max) or public (webinar) meeting (50 people max)
- Type a title
- Add a description if you would like
- Enter in the number of attendees
- Choose a Start Date and Time
- Set the length (duration)
- Click Create Meeting

## Adding Participants

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### Participant Roles

**Host** - Person who created the meeting, always a moderator. Only a licensed 3C user can be the host of a Collaboration meeting

**Moderators** - Have privileges to start, hold and manage a meeting. Moderators can enter the meeting room to prepare the meeting, even before it is started (up to 15 minutes prior) Any participant of the meeting can be assigned the moderator rights by the host before or after the meeting has started

**Speakers** - Participants with extended rights; they can ask questions or express their opinion

**Participants** - Have a passive role with limited privileges. They can take active part in the meeting if their role is changed by moderator

## Searching for Participants

- Select the contact search field
- Search by first, last, number, or email
- Search results are displayed in alphabetical order

## Creating New Participants Manually

- Click Add new participant
- Complete the following fields to create your participant
- Click Save

**Note: To make participants moderators, check the box for Moderator in the Added Participants field**

## Inviting Participants via Call-Out

- Click the phone button in the Invite Participants area
- Enter participant's name in the popup window
- Select the destination country or use the dial pad to enter the country code
- Use the dial pad to enter the participant's number
- Click Call
- Close dial pad when call connects

## Sending Invites to Participants

- Select Send Invitations when you finish editing your participant list. A pop-up menu appears:
- Send Notifications - Select to send notifications only to added participants, or to all participants
- Send Now - Select to immediately send the invitation to participants

**Note: You can invite participants via email while a meeting is in progress**

## Uploading a File or Presentation

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- Select Meeting actions
- Select Meeting Details
- Click Upload
- Select your presentation
- Click upload
- Select the Lobby checkbox

## Uploading a File or Presentation - from the Meeting Room

- Click Upload in the presentation area
- Select your presentation
- Select the Use this presentation in the lobby checkbox
- Click upload

## Joining a Meeting

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- Click the link that sent with the Outlook Invite **OR**
- Open the UC Client
- Click on the Collaboration tool  This will open internet explorer
- Click Join Web Meeting **OR** Join Web and Phone Audio

## Starting a Meeting (Moderator)

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- Click Start Meeting (located at the top left side of the screen)

### Ending a Meeting

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- In the meeting room, click the meeting menu
- Select End Meeting
- Click Yes

**Note: No one can join the meeting after the end time. Only hosts can end meetings. Meetings end automatically at the scheduled end time. A moderator or host can extend the meeting beyond the scheduled end time if sufficient capacity is available on the CMM.**

### Recording a Meeting (Moderator)

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- Start the meeting
- Click Start recording
- Give the recording a title and description
- Click Start Recording

#### Recordings for Playback

The meeting recordings are stored in the meeting archive after the meeting ends. Participants can watch recordings via the landing page of the meeting

### Publishing a Meeting

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- Click Meeting Actions
- Select publish meeting

### Turning Off Sound

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- Click Settings
- Select Turn off sound to turn the sound for the meeting off. Select Turn on sound to turn the sound of the meeting on

### Screen Sharing

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- Click the Screen Sharing button below the presentation area
- Download the Screen Sharing Client (You will only have to do this once)
- Double click on the screen sharing client to run
- Start the UC Client, a 3C collaboration meeting icon appears in the menu bar of your operating system

### Voting

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- Click Tools
- Click Vote
- Select New Vote
- Enter the title and questions of the vote in the window
- Enter the possible responses to the vote
- Determine the number of answer options to your question by clicking on the Add answer or Remove answer buttons
- Click Start vote to vote immediately. Click Save vote to save the vote for later. You can access saved Votes on the Tools menu
- Click Yes to start the vote

#### Publishing a Vote

Moderators see a live preview of the results while participants are voting

- Clicking Stop voting when you want to stop the vote
- Click Publish the vote results

### Giving Feedback

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- At the bottom left-hand side of the meeting, click give feedback
- A list will appear with icons to select
- After you select the specific icon, it will appear next to your name on the participant list

### Sending a Message to All Participants

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- Click tools
- Click Enable Messages
- Select the Chat visible to all participants checkbox
- Type your message
- Click send-The message window then opens in the Meeting Room

### Scheduling a Recurring Meeting

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- Open Outlook Calendar
- Click New Meeting
- Enter the CMM meeting address in the **To** field
- Enter the addresses of your participants in the **To** field
- Enter Subject
- Click Recurrence
- Enter the date and time for the meeting
- Select how frequently the meeting will occur
- Click OK
- Click Send
- Click the link in the confirmation email to confirm you will attend the meeting

### Training Links:

<http://www.loffler.com/support/training/voice-solution-training/nec-telephony-phone-systems/>

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