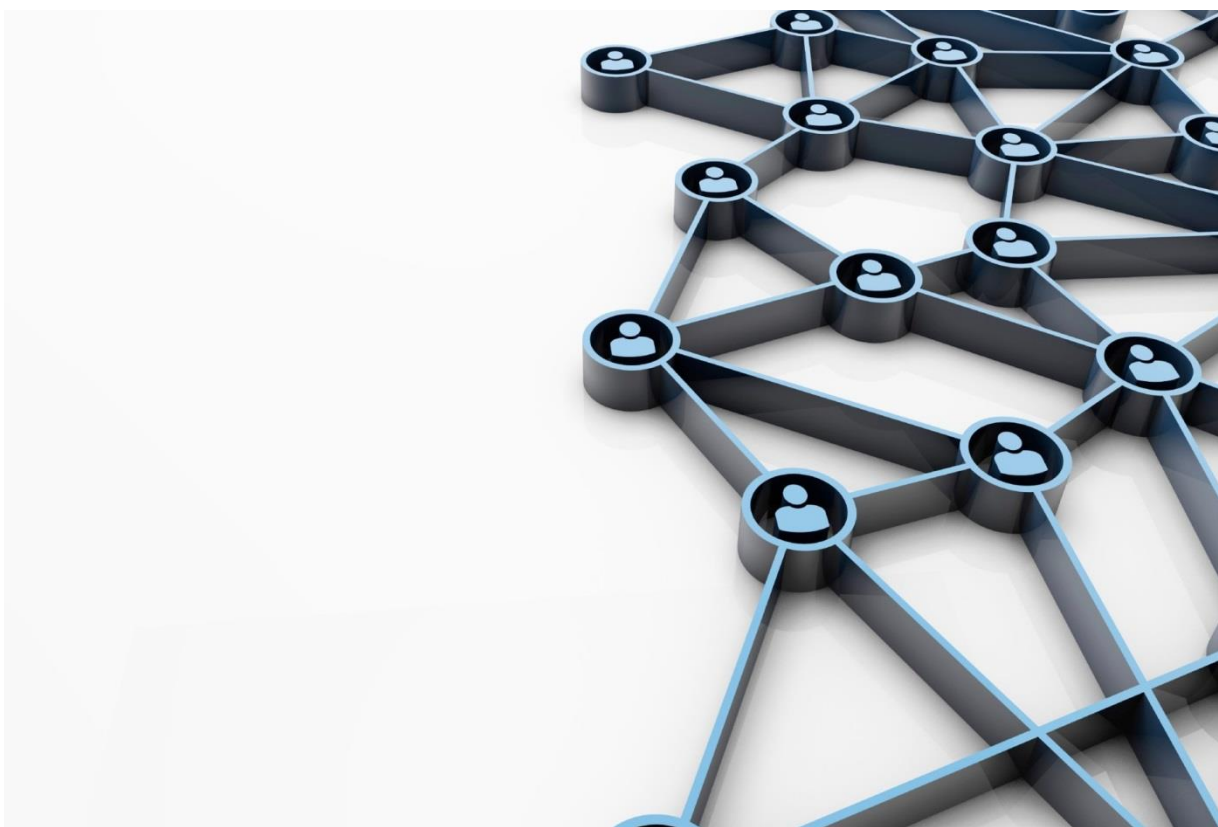


Accession Meeting

Quick Reference Guide

for UCaaS+



Version 1.0
June 30, 2017

Revision History

Revision	Date	Description	Initials
1.0	6/30/17	First published version.	CS

Purpose

Use this quick reference guide to learn how to use NHC's Accession Meeting, UCaaS+ collaboration tools.

Navigation

To locate a particular topic, search the document by keyword, refer to the index, or to one of the supplemental documents listed below. If you have questions about information that appears in this guide, use the contact information on the last page to get in touch with a service representative.

References

Refer to these supplemental reference documents for more information about newVoice features and their use:

newVoice Hosted PBX Product Guide

Overview for UCaaS and UCaaS+

newVoice Desktop Quick Reference Guide

newVoice Mobile Quick Reference Guide for iOS

newVoice Mobile Quick Reference Guide for Android

CommPortal Quick Reference Guide

Voicemail Quick Reference Guide

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Overview

Accession Meeting Quick Reference Guide contains information required to use Accession Meeting's collaboration tools. How you use Accession Meeting depends on how you and your colleagues customarily work together, and on what you need to accomplish for a given project. Each Accession Meeting session will accommodate up to 50 participants.

The sections below contain guidance about common operations, to help you learn your way around the platform:

- Start a meeting
- Set meeting options
- Invite people
- Manage a meeting
- Participate in a meeting
- Share your screen
- Control a desktop remotely
- Schedule a meeting

Start a Meeting

To open a collaboration session in Accession Meeting, launch newVoice Desktop and log in.

Note: You can participate in a meeting from any mobile device that has newVoice Mobile installed. To host a meeting with three or more participants, use newVoice Desktop.

After you start a meeting, the main meeting window opens:

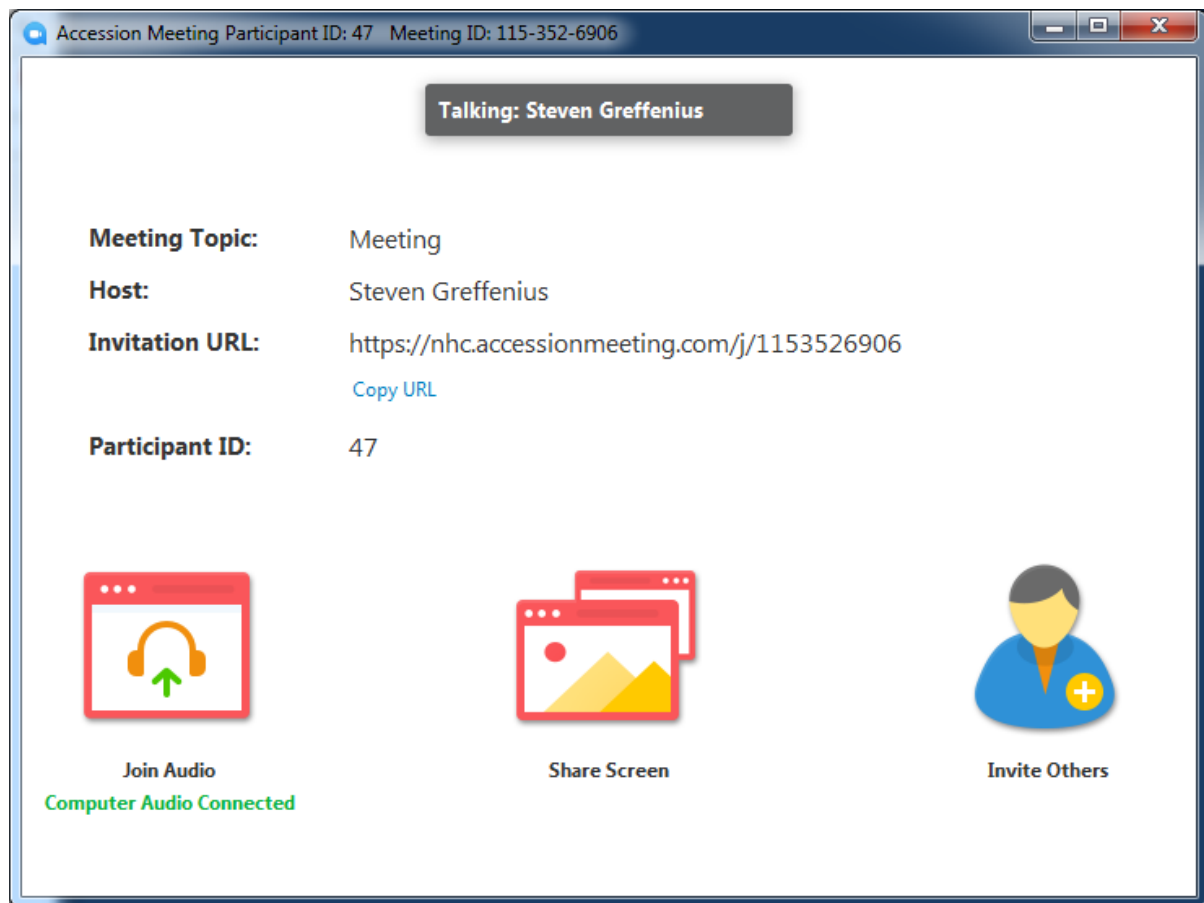


Figure 1. Main meeting window.

You can start a meeting from more than one location in the platform. Easiest is to issue an invitation to a business group colleague from a Desktop Chat window open for that person. The person who issues one or more invitations is the meeting host. For more information about how to invite participants to a meeting, see *Invite People*.

When you hover over any part of the main meeting window, the meeting toolbar appears at the bottom of the window:

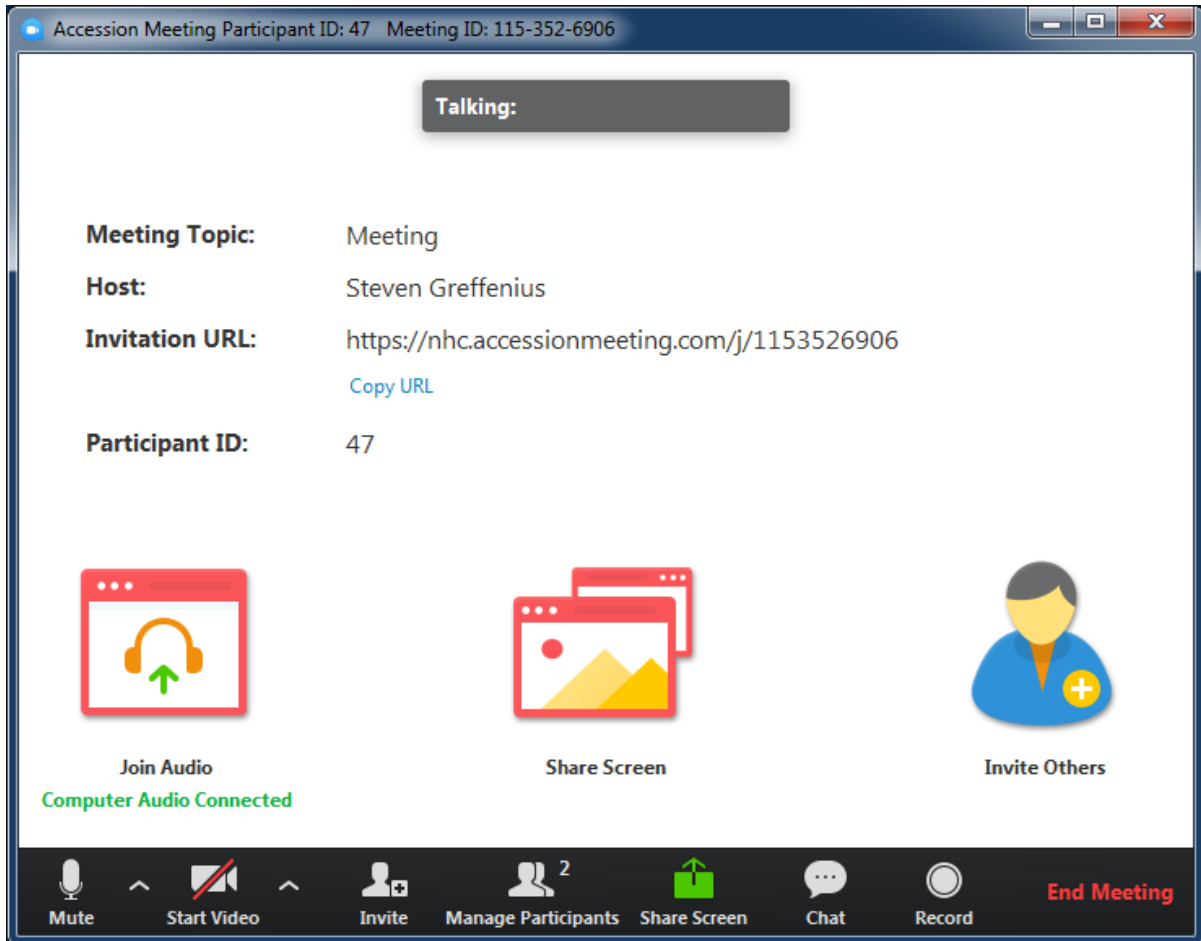


Figure 2. Hover over meeting window to show meeting toolbar at the bottom.

Use the tools available in the meeting window to participate in or manage a meeting.

Set Meeting Options

Set meeting options to create a predictable environment when you host or participate in a meeting. You can modify audio and video settings anytime during a session.

Preferences

To open meeting options, select Tools > Options in the Desktop's top menu, then click Meetings in the Options window:

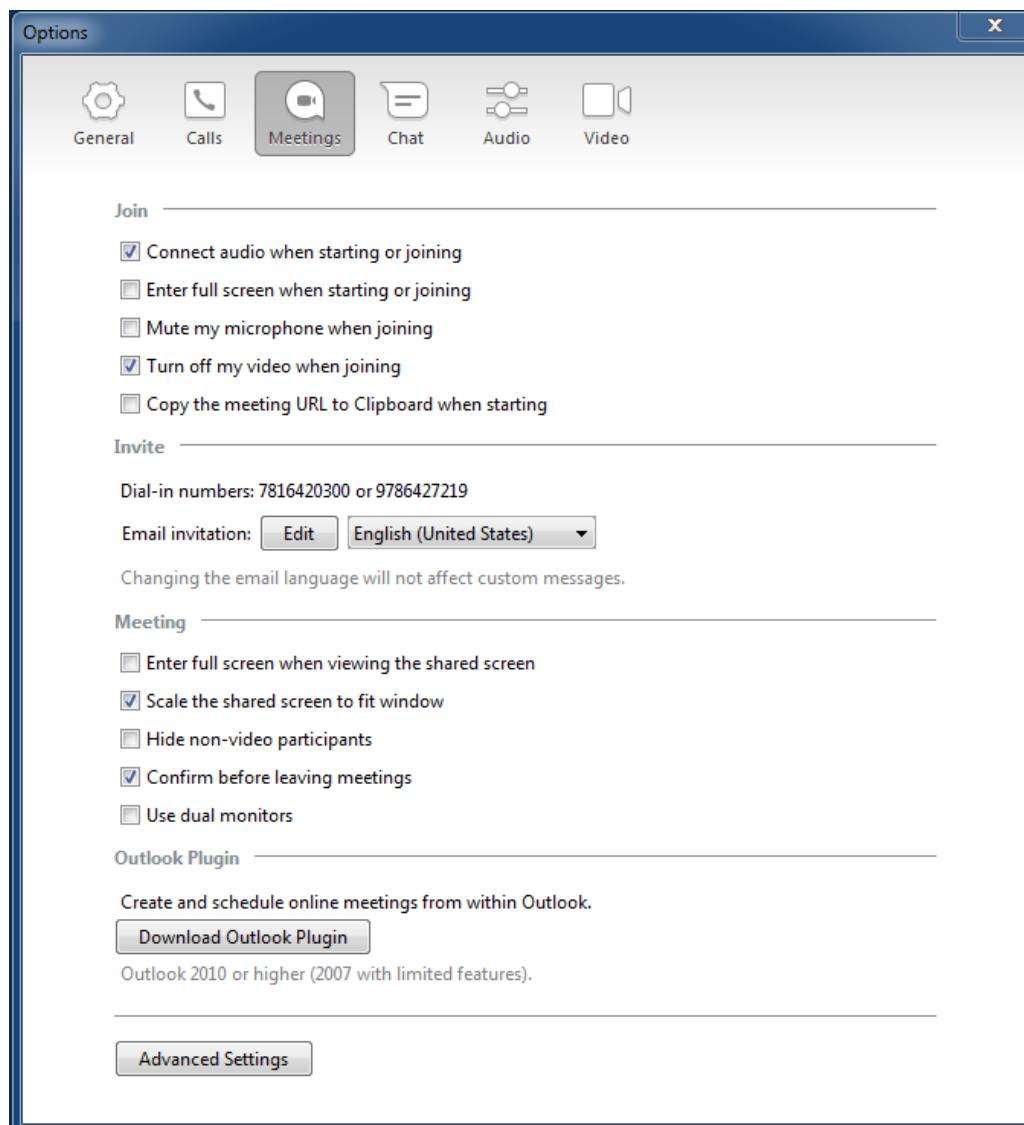


Figure 3. Meeting options.

You can host or participate in any meeting with all of the default options in place.

Audio

By default, Accession Meeting uses your computer's microphone and speakers to handle audio for the meeting. To check or modify your computer's audio, click the up arrow next to Mute, then select Audio Options...

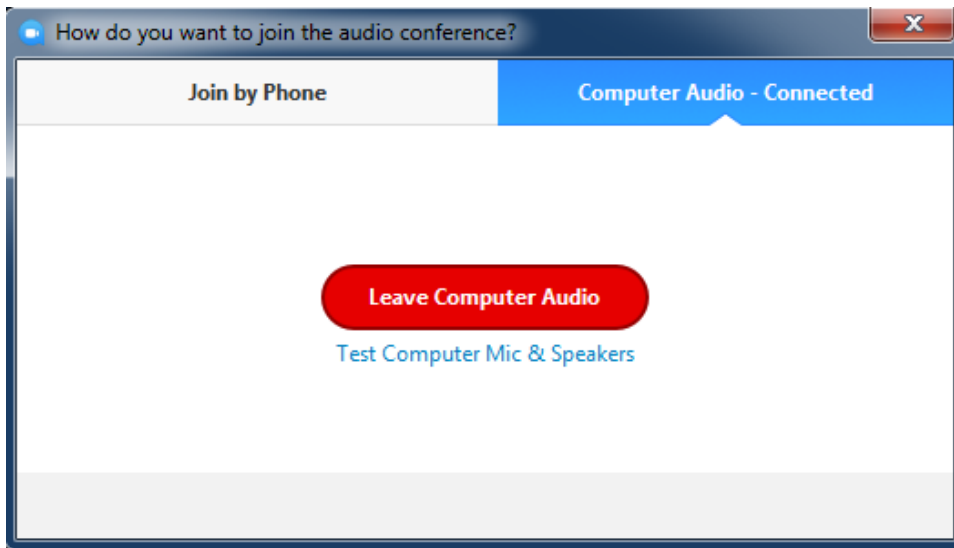


Figure 4. Audio options screen confirms default connection.

To modify your audio connection to participate by phone, click the Join by Phone tab, then click Done:

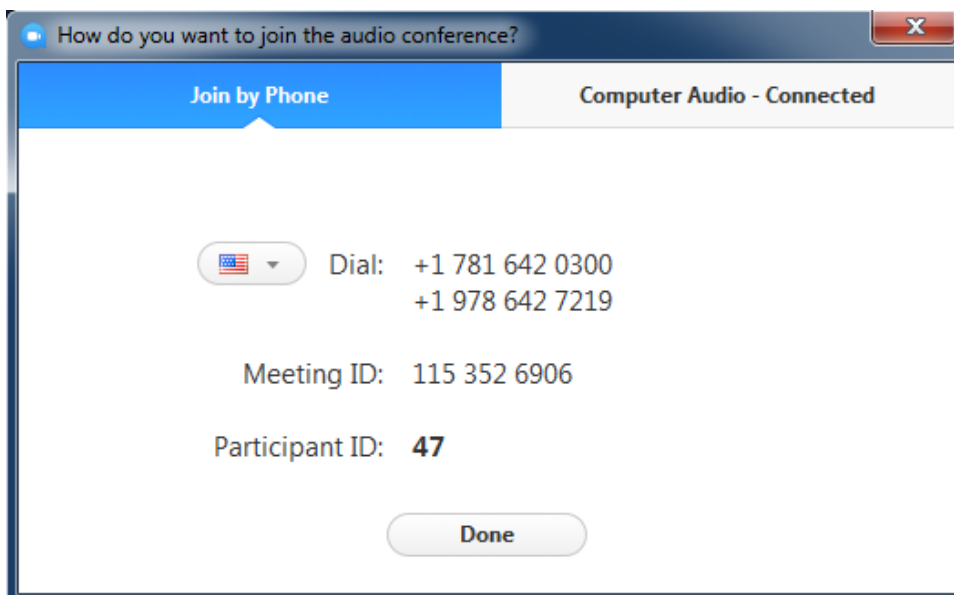


Figure 5. Click Join by Phone to change your audio connection.

To change selections for your microphone and speakers, select Tools > Options in the Desktop's top menu then click Audio:

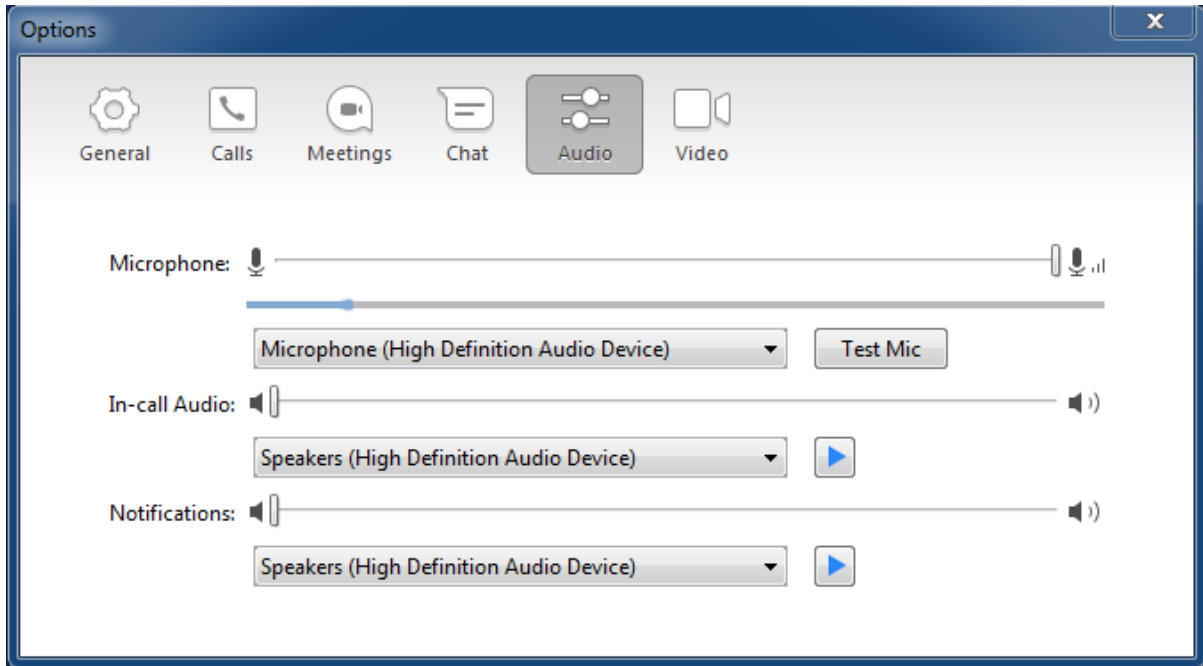


Figure 6. Audio options.

Video

Click Start Video in the meeting toolbar to turn on your computer's video camera. Video feeds from your camera, and those of other participants, replace the static meeting window. To rearrange the video feeds in your meeting window, click Gallery in the upper right portion of the screen.

Invite People

After you have started your meeting, invite other people as needed. Click Invite in the meeting toolbar, or click the large Invite Others icon in the main meeting window. The Invite Others to Meeting panel opens:

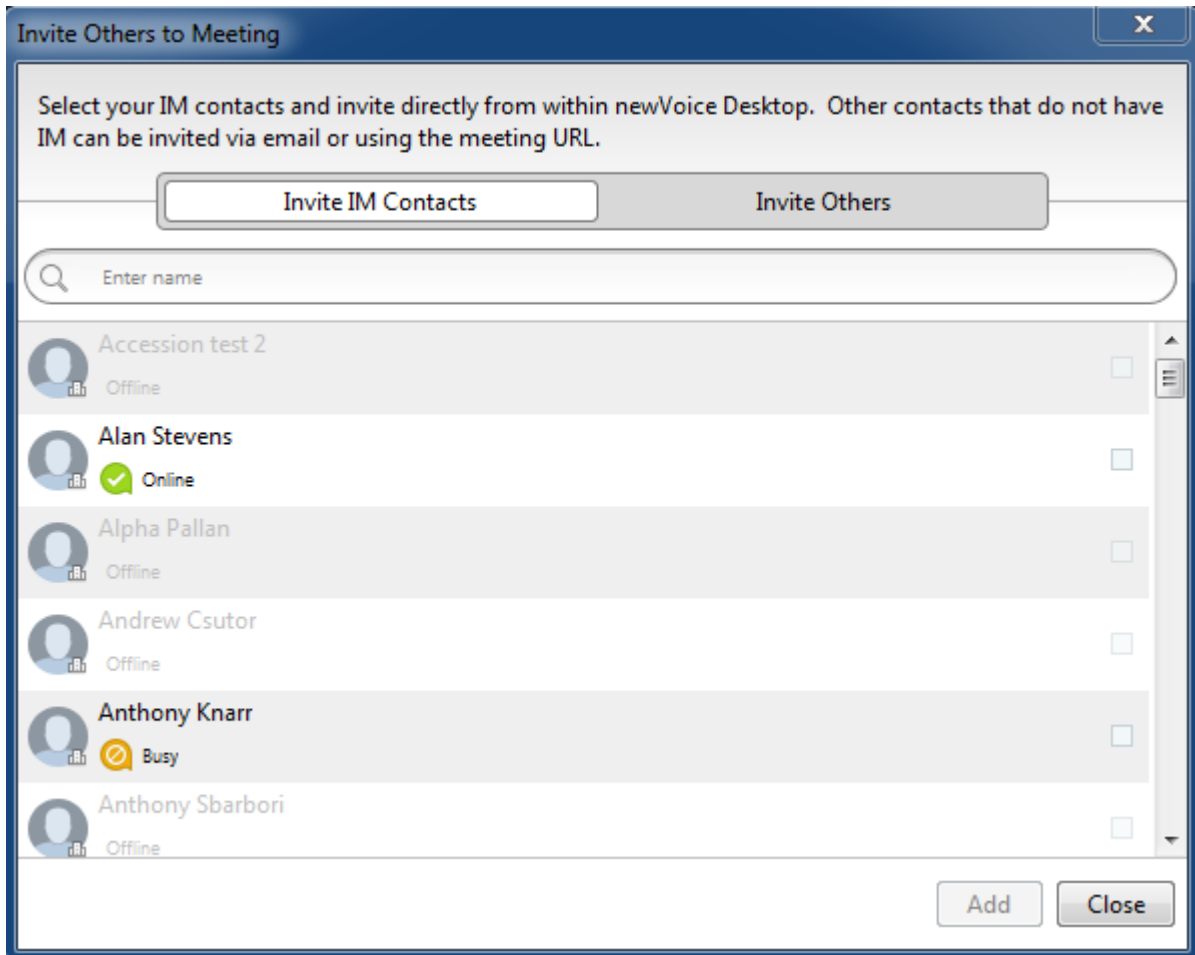


Figure 7. Invite IM Contacts to Meeting.

Directions below the panel's title bar explain your options. Select Invite IM Contacts – people in your business group – or Invite Others – people outside your business group.

To invite IM contacts, select among those who are online. The number of people you have selected appears in parentheses next to the Add button. Click Add when you have selected business group contacts who should participate.

To invite people not in your business group, select Invite Others at the top. Then follow instructions in the Invite Others panel:

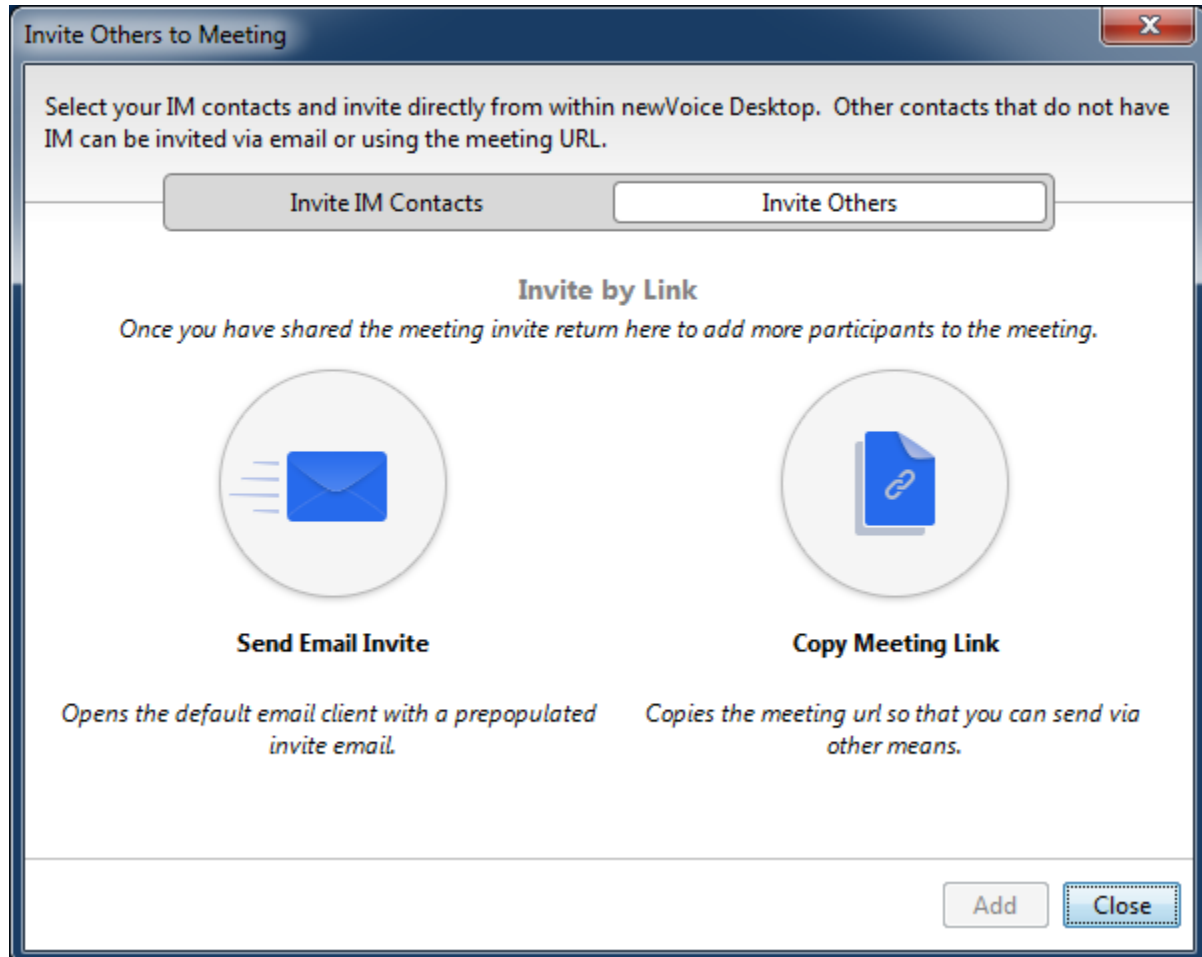


Figure 8. Invite Others to Meeting.

Click Close after you send meeting links to people you want to invite. When recipients click the meeting link, the meeting opens in their default browser.

Manage a Meeting

The meeting host can:

- Manage participants
- Assign a new host
- End the meeting

Note: All of the instructions in this section assume you are the meeting host.

Manage Participants

Only the meeting host can manage all participants in the meeting. If you are the host, click Manage Participants in the meeting toolbar to open the participants list on the right. Click the down arrow at the top, then Pop Out to open the Participants panel:

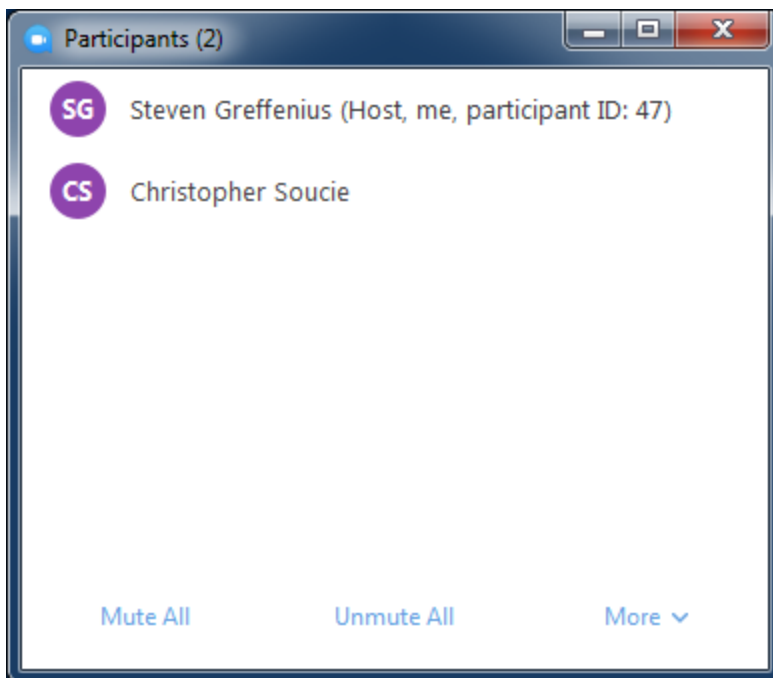


Figure 9. Manage participants as host.

Hover over the panel to show audio and video status for each participant on the right. Hover over a participant's name to show option buttons for that participant. As host, you can mute and unmute your audio, and enter a new screen name. You can mute and unmute audio for other participants as well.

For other options related to a participant, click More on the right after you hover over the participant's name. Then select from these actions in the pop-up menu:

- *Chat* – open a private chat window.
- *Ask to Start Video* – send request to enable participant's video camera.
- *Make Host* – make participant the new meeting host.
- *Allow Record* – record participant's audio and video, as applicable; select Forbid Record to stop recording.
- *Rename* – enter a new screen name for participant.
- *Remove* – remove participant from meeting.

To mute all participants, click Mute All at the bottom of the Participants panel. A prompt asks you to confirm, and gives you the option to allow participants to unmute themselves. To unmute all participants, click Unmute All at the bottom of the panel.

To select other options available to meeting hosts, click More at the bottom right of the Participants panel:

- *Mute Participants on Entry* – checked when selected.
- *Play Enter/Exit Chime* – checked when selected.
- *Lock Meeting* – prompt asks you to confirm that no new participants can join the meeting after you lock it. Select More > Unlock Meeting to permit new participants again.
- *Lock Screen Share* – prompt asks you to confirm that only host can share screen when locked. Select More > Unlock Screen Share to permit other participants to share their screens again.
- *Merge to Meeting Window* – if you pop the Participants panel out of the meeting window, select to attach the list to right side of the window.

Assign New Host

If you want a meeting to continue after you leave the meeting, assign a new host:

1. Select Manage Participants in the meeting toolbar.
2. In the Participants panel, hover over the new host's name.
3. Select More on the right, then select Make Host in the op-up menu.
4. Click Yes in the Accession Meeting dialog box to confirm the change.

List of participants shows the person you selected as the new host.

End Meeting

If you as host click End Meeting in the meeting toolbar, a prompt asks if you want to End Meeting for All, or Leave Meeting:

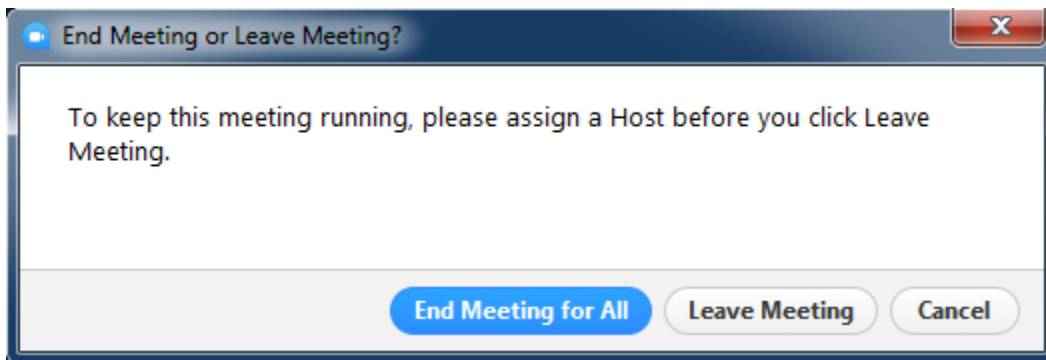


Figure 10. End Meeting for All or Leave Meeting?

If you want the meeting to continue after you leave, click More > Make Host for another participant before you click Leave Meeting. If you want to end the meeting, click End Meeting for All.

Participate in a Meeting

Options available in the Participants panel change if you are a meeting participant, but not the host. Click Participants in the meeting toolbar to open a list of participants on the right. As before, click the down arrow at the top, then Pop Out to open the Participants panel:

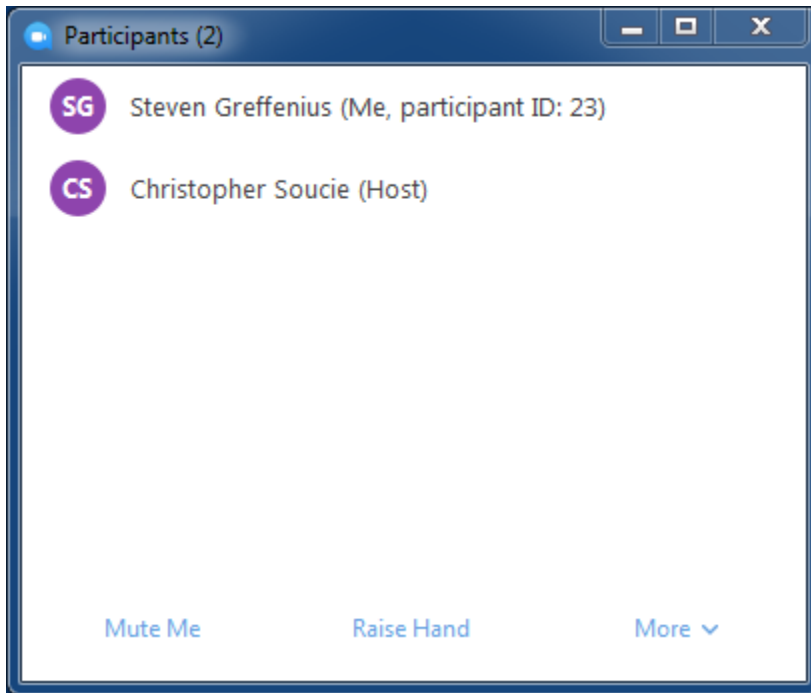


Figure 11. Participants panel when for a non-host.

To disable your microphone, click Mute Me at the bottom left. To re-enable your microphone, click Unmute Me.

To tell the meeting host you have something to say, click Raise Hand. A hand icon appears next to your name. Wait for the meeting host to recognize you. To remove the hand icon next to your name, click Lower Hand.

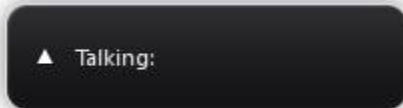
Click More at the lower right to show these options:

- *Reclaim Host* – as a former host, select More > Reclaim Host to reassume that role.
- *Merge to Meeting Window* – re-attach Participants panel to meeting window, if you have popped the participants list out.

For Windows users: If you minimize your meeting window, the blue meeting icon disappears from your taskbar, and a black box appears on your desktop:



Hover over the box, then click the down arrow on the left to hide video:



To restore the meeting window, hover over either black box, then click the pop-out icon at the lower right.

Share Your Screen

To share a screen with other meeting participants, click Share Screen in the meeting toolbar. You can share your desktop, a whiteboard, your mobile device display, or any application you have open.

Share Desktop

To share your desktop, click Share Screen in the meeting toolbar. Your desktop is the default selection:

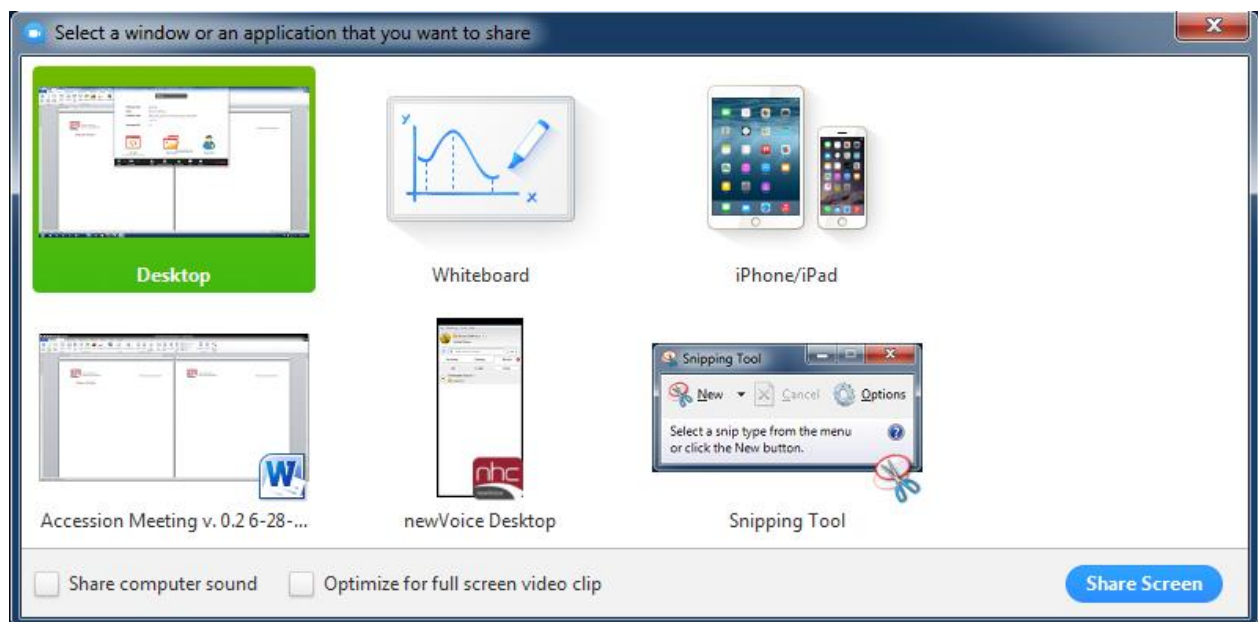


Figure 12. Select a window or an application to share.

Click Share Screen at the bottom right to share your desktop with other participants. A screen share toolbar appears at the top of your desktop. Click Stop Share directly under the toolbar to stop sharing your screen.

Share Whiteboard

To share a whiteboard, where you can create notes or diagrams for other participants, click Share Screen in the meeting toolbar. Select Whiteboard in the screen share window, then click Share Screen at the lower right. A blank whiteboard appears.

Use the whiteboard toolbar underneath the screen share toolbar at the top of your screen to write on your board:

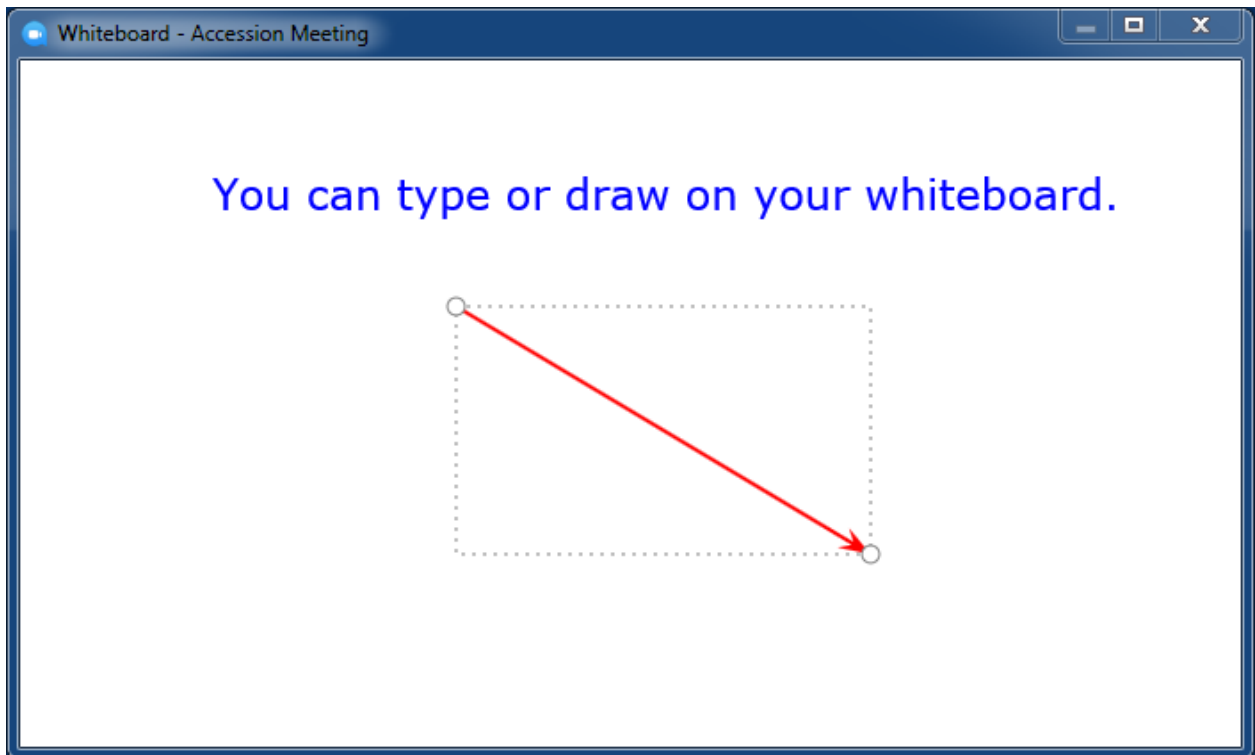
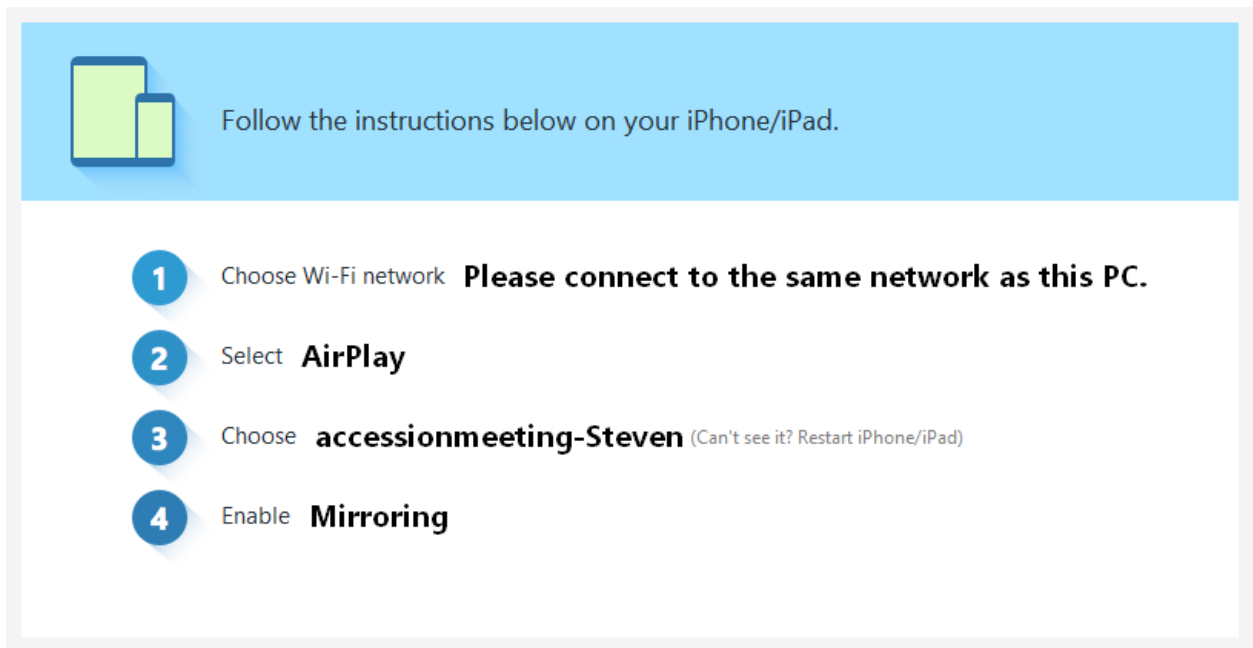


Figure 13. Share a whiteboard with other participants.

Share iPhone/iPad

To share the display on your iPhone or iPad, click Share Screen in the meeting toolbar. Select iPhone/iPad in the screen share window, then click Share Screen at the lower right. Then follow these instructions on your mobile device:



The screenshot shows a light blue header bar with a green icon of a laptop and a smartphone. Below the header, the text reads: "Follow the instructions below on your iPhone/iPad." Below this, there is a list of four numbered steps:

- 1 Choose Wi-Fi network **Please connect to the same network as this PC.**
- 2 Select **AirPlay**
- 3 Choose **accessionmeeting-Steven** (Can't see it? Restart iPhone/iPad)
- 4 Enable **Mirroring**

Figure 14. Instructions to share the display on your mobile device.

When finished, verify with meeting participants that they see the contents of your mobile display.

Share a Window

To share a particular window or application open on your desktop, select Share Screen in the meeting toolbar. Select one of the applications available in the screen share window, then click Share Screen at the lower right:

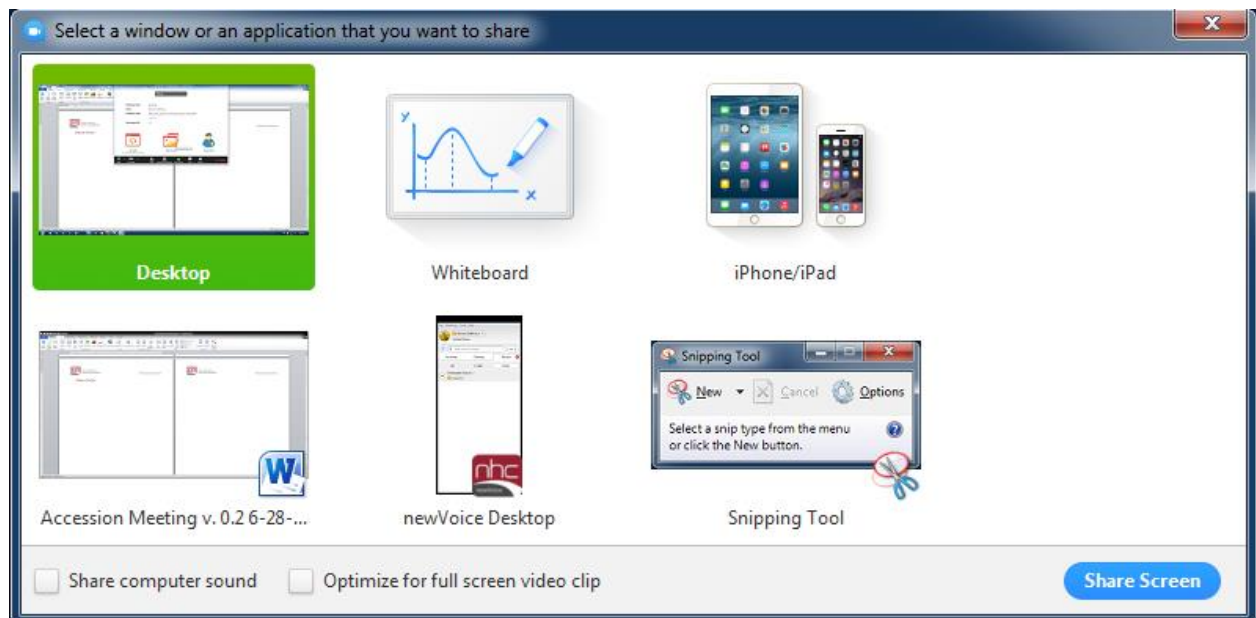


Figure 15. Share a window or application.

Note the screen share toolbar and the annotation toolbar at the top of the menu. Use the annotation toolbar to mark up a document, drawing, spreadsheet, or anything else you share with meeting participants.

Control a Desktop Remotely

Use remote desktop control to teach, troubleshoot, and solve problems. Two examples illustrate how to use this tool.

Example 1: Participant A wants to control Participant B's screen during a collaboration session. First, B shares his screen with A. Then A can request control from B via Options > Request Remote Control in the shared screen status bar. After B accepts A's request, A has control. To give up control, A selects Options > Give Up Remote Control in the shared screen status bar.

The image below shows the Request Remote Control dialog box used in Example 1:

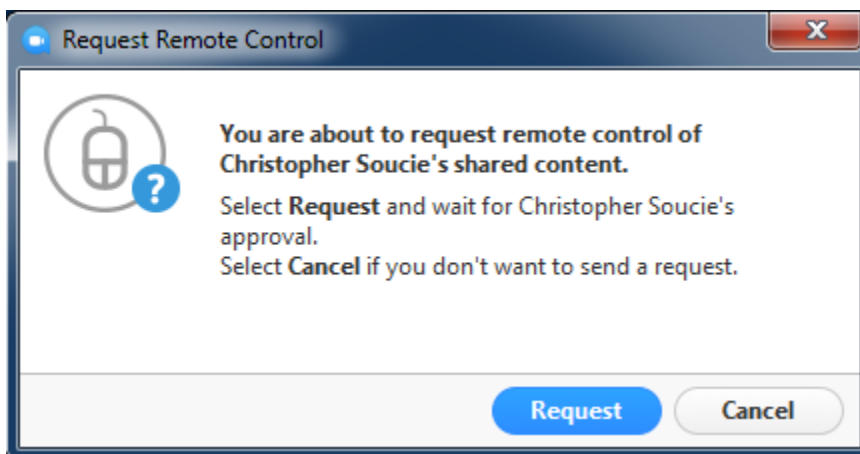


Figure 16. Request Remote Control dialog box.

Example 2: Participant A wants to grant control of his screen to Participant B. First, A shares his screen with B. Then, to grant control unilaterally, A selects Remote Control > Give Mouse/Keyboard Control to [name of participant] in the shared screen toolbar. To stop remote control after having granted it, A selects Remote Control > Stop Remote Control in the shared screen toolbar.

The image below shows the shared screen toolbar, with Remote Control on the right:

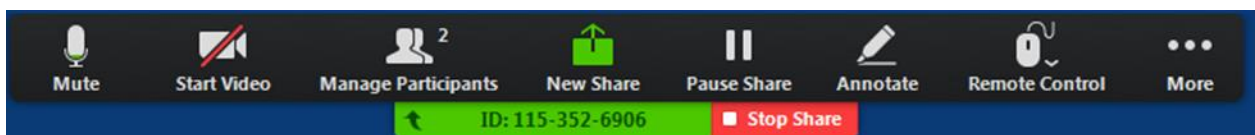


Figure 17. Shared screen toolbar.

The status bar at the top of a shared screen indicates when you have control:

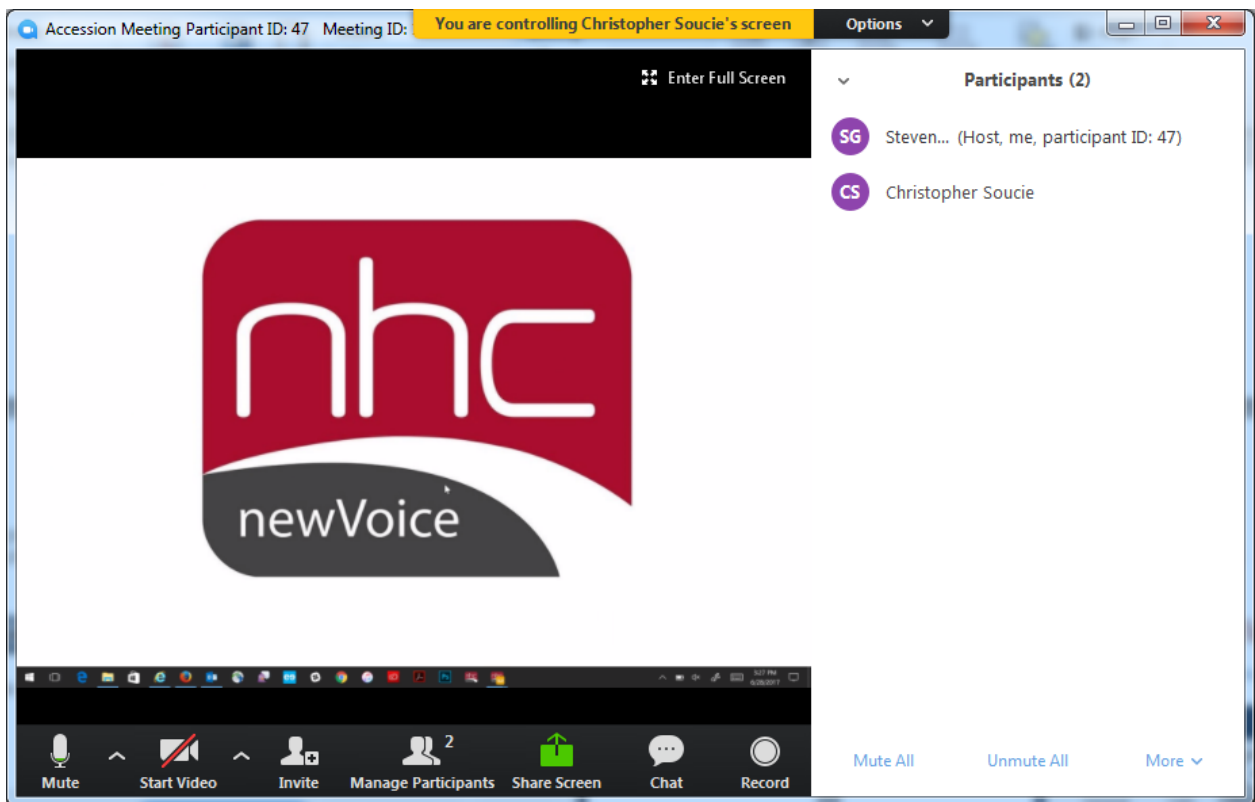


Figure 18. Shared screen with status bar to confirm remote control.

Note the Options menu at the right side of the status bar.

Schedule a Meeting

To schedule a meeting, select Meetings > Schedule a Meeting... in newVoice Desktop's top menu. Schedule a Meeting appears:

Accession Meeting - Schedule a Meeting

Topic: Steven Greffenius' Accession Meeting

When

Start: Wed June 28, 2017 05:00 PM

Duration: 1 Hr 0 Min

Time Zone: (GMT-4:00)Eastern Daylight Time

☐ Recurring meeting

Video (when joining a meeting)

Host: ☒ On ☐ Off

Participants: ☒ On ☐ Off

Audio Options

☐ Telephone Only ☐ Voip Only ☒ Both

Meeting Options

☐ Require meeting password

☐ Enable join before host

Calendar

☒ Outlook ☐ Google Calendar ☐ Other Calendars

Schedule

Figure 19. Schedule a Meeting.

Enter the date and time, and other options as desired. When finished, click Schedule at the bottom right. Depending on your selection in the Calendar section, Accession Meeting opens Outlook, Google Calendar, or a dialog box with the meeting link and generated text for email invitations. Send invitations, with the meeting link, to prospective participants.



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