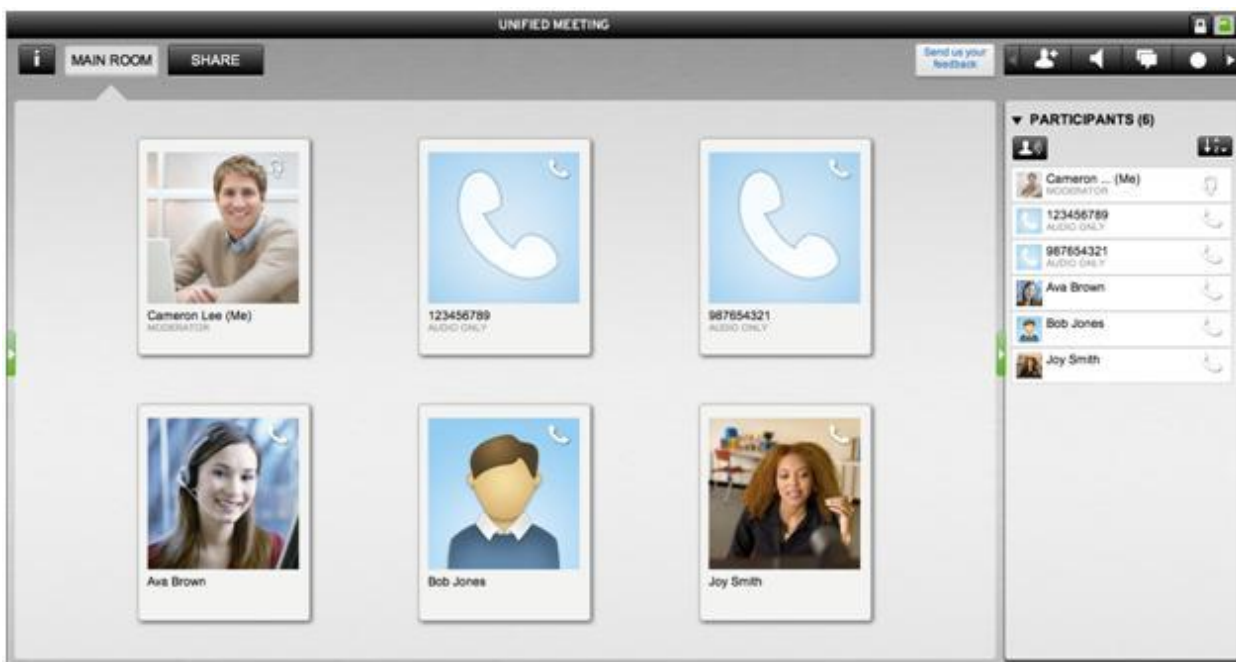


# Unified Meeting 5

## User Guide for Windows

Unified Meeting® 5 is a web based tool that puts you in complete control of all aspects of your meeting – including scheduling, managing and securing your meetings.



Whether you are collaborating online or simply using audio to meet, Unified Meeting 5 improves your meeting experience with intuitive and powerful productivity enhancements that are available to you with a click of your mouse.

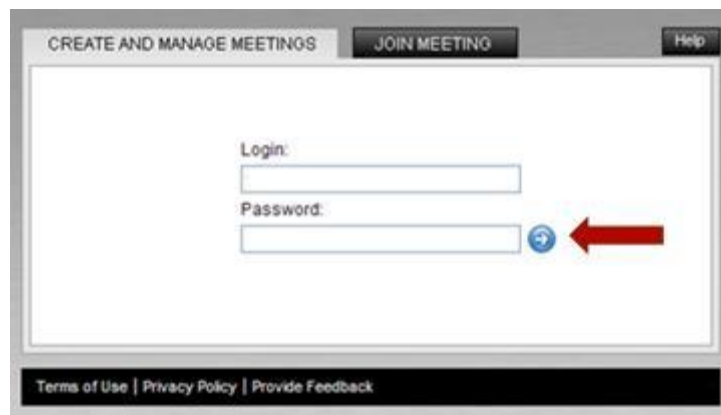
The instructions in this user guide will help make meetings easier to manage, more effective and more productive.

*Note: Your participants are not required to download the application to join your meeting.*

## Get Started


It's never been easier! Just follow the simple instructions below and you are on the way to your first unified meeting experience.

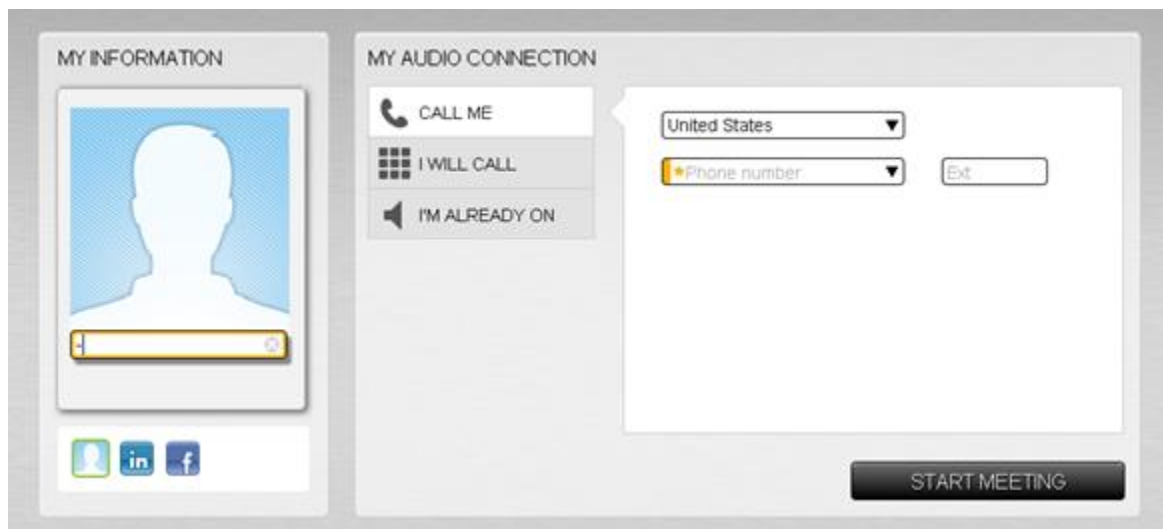
*Note: Before proceeding with the following steps, please ensure that you have administrator rights to perform the download and installation.*



## Download and Installation

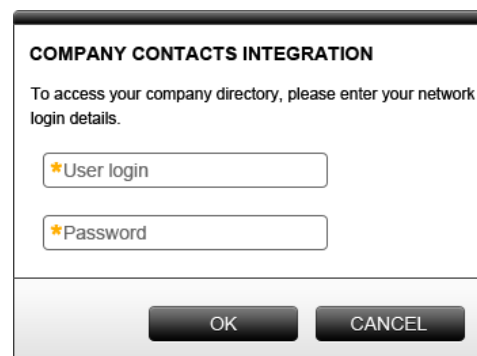
During the install, you will need to enter your log in and password from your welcome email so keep that information available.

1. Click the URL in step 1 in your Welcome email.
2. Enter your Unified Meeting 5 login
3. Enter you Unified Meeting 5 password
4. Click 
5. Enter your details on the left under My Information



6. Select how you wish to join the audio portion of the meeting from these three options:
  - a. **Call Me:** choose your country and enter a phone number for the system to dial out to you.
  - b. **I Will Call:** view dial-in access numbers and conference code which you can dial from any touch tone device.
  - c. **I'm Already On:** should you already be connected to the audio or wish to have a web only meeting.

7. Click **Start Meeting**. You will join the meeting as moderator running the browser-only version of the service.
8. You will see a pop up window on the bottom right of your screen. If you do not see this pop up window, please click the Information Tab (i) icon at the top left corner and select **Install the required tools now** on the right side of the interface.
9. Follow the on screen instructions. The installation box will keep you informed of the install progress.
10. Once it has finished installing, you will see a pop up confirming integration with your email client.



11. When installation is complete you will see the Unified Meeting 5 desktop icon in your system tray and a pop up confirming you are now signed in.
12. You will be asked to enter your network credentials to synch your contacts with the Quick Invite Tool. These are the credentials you use to access your company’s network.

**Browser Moderator**

If you do not install the meeting application or are running the application via a tablet or smart phone, you can launch browser-only meetings to manage your audio participants online. You can utilize features such as mute, dial me, chat and open/close meeting room door.

Please note that the following features are not available in browser only: application sharing, integration with instant messenger, calendars and contacts. Supported operating systems and browsers for Browser Moderator include:

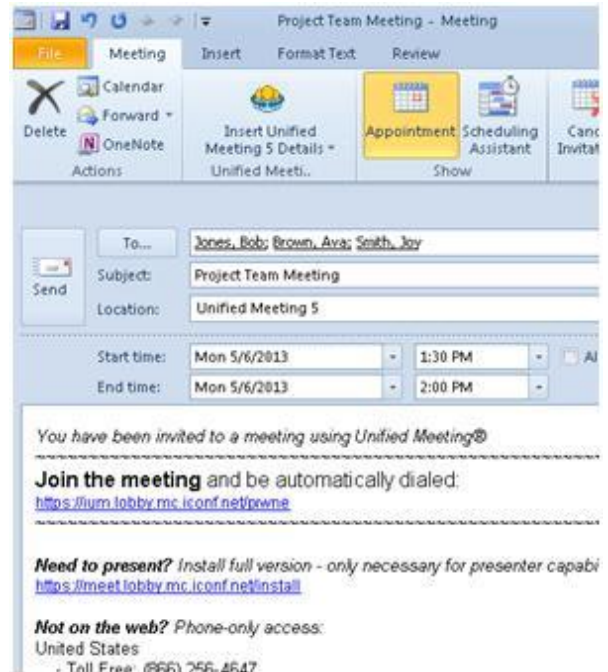
<p><b>Operating system</b></p>	<ul style="list-style-type: none"> <li>• Windows XP SP3 / Vista / 7</li> <li>• MAC OS X 10.6 (Snow Leopard) or higher</li> <li>• Android® Tablet (limited support)</li> <li>• iPad® (limited support)</li> </ul>
<p><b>Browser</b></p>	<ul style="list-style-type: none"> <li>• Microsoft Internet Explorer 7 or higher</li> <li>• Google Chrome 11 or higher</li> <li>• Mozilla FireFox 10 or higher</li> <li>• Safari 5.1 or higher</li> </ul>

## Schedule and Start Meetings


### With Microsoft Outlook

1. Open an appointment time in your Outlook calendar and then click **Unified Meeting 5**. The meeting access information will appear in the body of the appointment.
2. Your calendar meeting invite will be automatically populated with meeting access links for you and participants.
3. To join the meeting, the Moderator and Participants click the link to join in the meeting invite.
4. Enter your display name (if you have not previously hosted a meeting) under My Information and select how you would like to join the audio portion of your meeting. Click **Join Meeting**

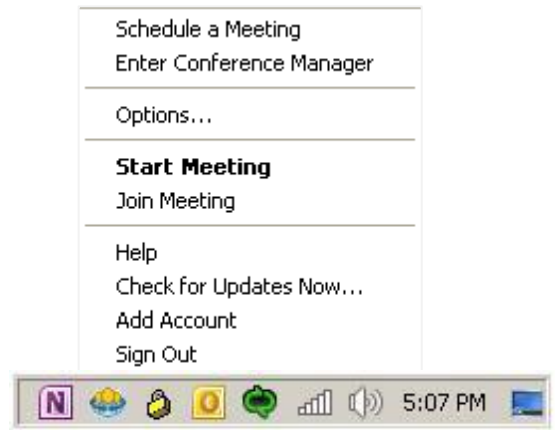
*Note: If you do not install the Outlook Calendar tool, click the Unified Meeting 5 icon in your taskbar and select Schedule a Meeting. Follow the steps through the scheduling wizard.*




## Unified Meeting 5 Desktop Icon

The Unified Meeting 5 desktop icon  is automatically populated in your taskbar when you install the Unified Meeting 5 application. This user friendly tool can be used for:

- Scheduling meetings.
- Accessing Conference Manager.
- Access the options menu
- Accessing scheduled or instant meetings with one-click.
- Joining meetings.
- Checking for software updates
- Adding accounts for multiple user scheduling



## Start a Meeting – Moderators

1. To start an instant meeting, click the Unified Meeting 5 desktop icon  located in your taskbar and select **Start Meeting**.
2. Enter your display name (if you have not previously hosted a meeting) under My Information and select how you would like to join the audio portion of your meeting. Click **Start Meeting**

Alternatively, you can also click the link to join the meeting from your own email calendar invite. If you are accessing the meeting from a device on which the meeting application is not installed, simply go the URL listed in your Welcome email and log into your account with your log in and password.

## Join a Meeting – Participants

1. To join a meeting, simply click the link in your email
2. Enter your display name under My Information, select how you would like to join the audio portion of the meeting and click **Join Meeting**. Select previously dialed numbers from a drop down when joining a meeting

*Note: Participants with the application installed can also join a meeting via the Unified Meeting 5 desktop icon  located in the taskbar. Select Join Meeting, enter the moderator's user login and click Join Meeting as Participant.*

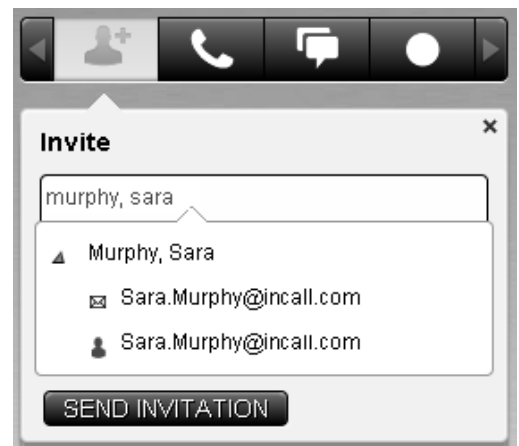
## Quick Invite Tool

The Quick Invite tool allows moderators to invite participants to join the meeting via e-mail or instant message once the meeting has started.

Please note: the first time you use this you may be asked to enter your network credentials, according to your network security settings.

The Quick Invite tool can be accessed from the drop down menu on the main tool bar. Once you start typing a name, the system searches for matches in the Active Directory and any installed Instant Message clients. Select the correct contact and method of invitation: by e-mail or by chat and click **Send Invitation**.

- If you selected e-mail, the system will automatically send the contact an invitation e-mail containing a link for your participant to use. This is sent via your installed e-mail system.
- If you selected Instant Message, the system will send a live chat message containing a link for your participant to use. This is sent via your installed instant messenger system.



*Note: Your instant messenger program must be running while performing the instructions above and to send invites to your Unified Meeting 5 participants.*

## Customize Your Business Card

### Add your information

- Name
- Title
- Email
- City\*
- Integrate with your LinkedIn or Facebook account
- Create a custom profile

*\*Note: City is automatically detected through your IP address and lists the current weather. You can change your city location but the weather capture will not automatically update.*

### Customize your photo

- Select an avatar
- Upload image / photo
- Take instant photo



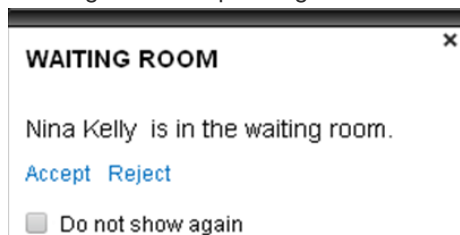
## Meeting Security

### Closing the meeting room door

Add further security to your meeting by closing the meeting room door by clicking the lock icon. The moderator can screen participants in the waiting room and then provide them access to the meeting one at a time.

You will be notified of an incoming participant by the desktop icon prompt. You can accept or reject an incoming participant by either:

- Clicking the corresponding link in the desktop icon prompt.



- Selecting the incoming participant in the wait list from the top left of the interface

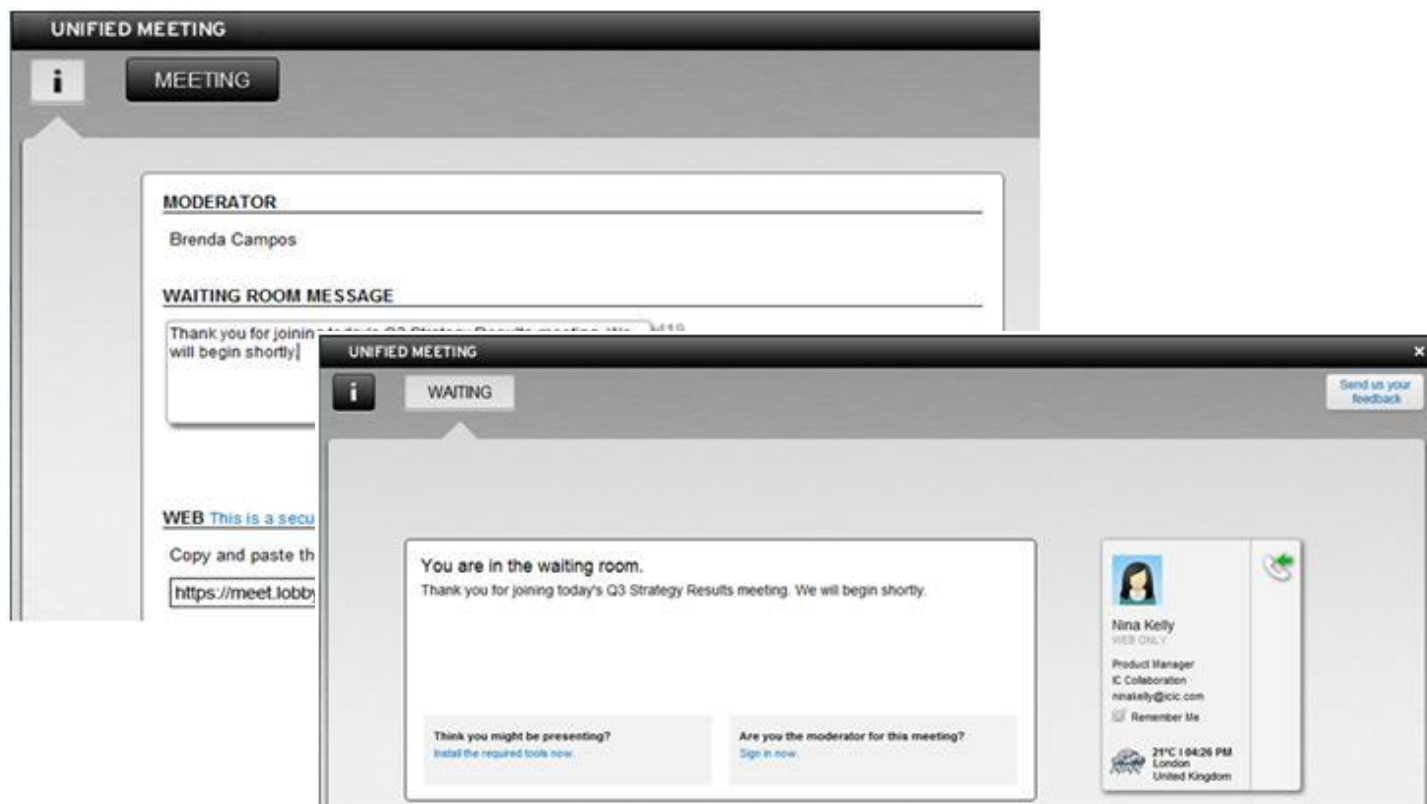


*Note: By default the door to the meeting is closed if only the web portion of the meeting is launched.*

### Customize the waiting room

Edit your personal message at any time to keep waiting participants informed if your previous meeting runs over or you need to notify them before entry of any updates such as gathering specific information from their e-mail files, etc.

To access this, click on the Information Tab (i) and type in a message, which will be updated in the waiting room in real time. The message can be updated as many times as needed.

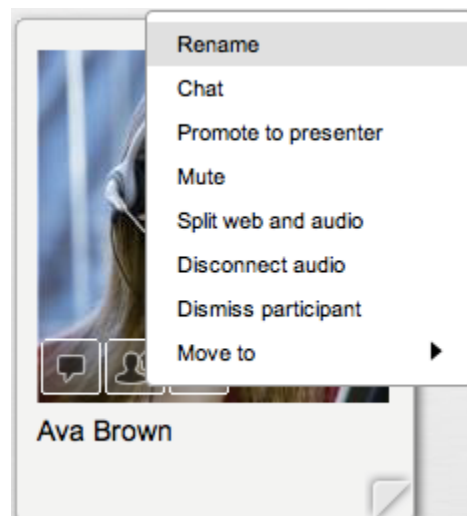


### Participant Number Identification


When using the installed client, upon joining a meeting, the Participant Number Identification feature looks up the participant’s dial-in number and automatically checks it against the moderator’s Personal Address Book (Active Directory).

If the name is not found, the moderator can right-click the participant audio line and rename it.

The participant name is then shown for the current meeting and will automatically display for any future meetings.



## Call Control

The moderator can always see the voice status of the participants in the participant panel or business cards. Know who is currently speaking or has recently spoken in the meeting by selecting  on the participants list





## Online Web and Audio Synchronization

By dragging and dropping their name and phone connections together in the participant list, moderators and participants can synchronize their own audio and web connections via the web interface without touching a telephone keypad.

Moderators can also synchronize participants' audio and web lines to easily identify who is speaking,

## Voice Status Icons


The moderator can always see the voice status of the participants in the Participant panel.

	<p><b>Standard voice icon</b> The participant (or moderator) is currently in the main voice meeting room.</p>
	<p><b>Active speaker icon</b> The participant (or moderator) is currently speaking, or it may indicate background noise coming from this line.</p>
	<p><b>Muted line icon</b> Participants cannot be heard when their lines are muted. In Mute and Group Mute mode, participants have</p>
	<p><b>Lecture Mute icon</b> Participants cannot be heard when their lines are muted and do not have the ability to unmute themselves</p>




### Mute/Unmute Participants

Click the voice icon next to the participant's name on their business card to mute or unmute that participant.

To mute/unmute all participants at once, click  at the top of the interface then select **Mute/ Unmute All**.


### Group Mute All and Lecture Mute All

Enable Group Mute All or Lecture Mute All by clicking  at the top of the meeting interface.

**Group Mute All:** All participants are muted and have the ability to unmute themselves by pressing #6 on their telephone keypad.

**Lecture Mute All:** All participants are muted and cannot unmute themselves.

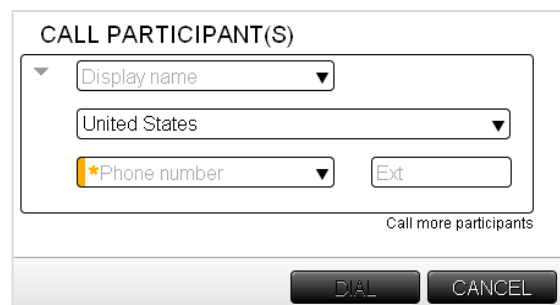
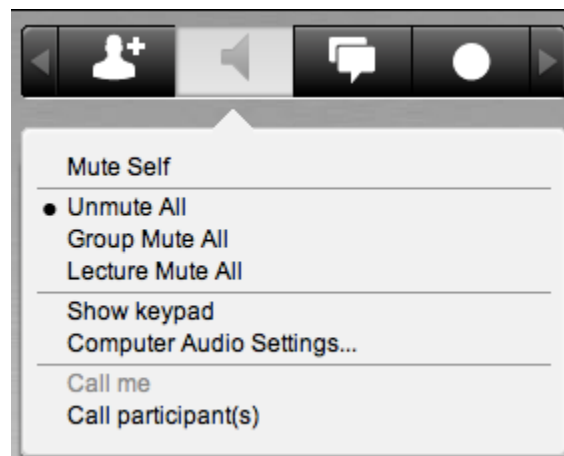
### Dial Out to Participants

From the toolbar menu, select  and select **Call participant(s)**. Enter the name and telephone number (no spaces or characters required) of the participant to call and click **Dial**.

To dial more participants simultaneously, click **Call more participants**

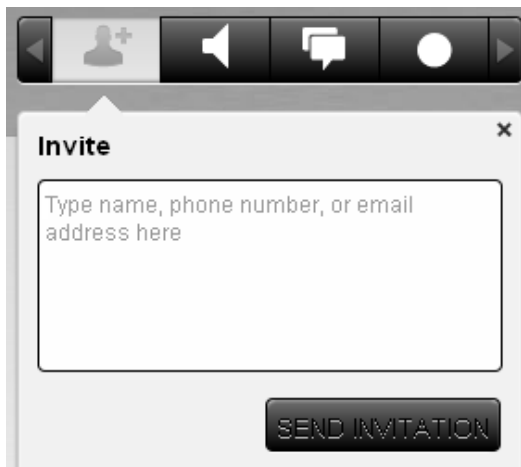
### Control Entry and Exit Notifications

Click **Alerts** at the top of the meeting interface to control participant entry and exit notifications for your current meeting. Choose from Tones, Names, Names and Tones or Nothing.



### In Meeting Invites

You can also invite participants by using the quick invite tool. You can search for contacts in your Active Directory and send an e-mail or Instant Message.



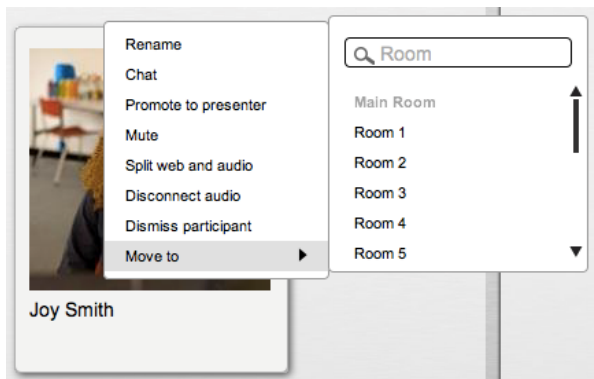
### Break Out Rooms

Move your participants into Break Out Rooms where they can have a separate meeting experience.

To create Break Out Rooms, click on any User Card Menu (in Main Room or Participant Panel)

Select **Move to** and click on any room number to initiate the Break Out Room View

Moderators have full control of all rooms (move participants between rooms, control audio, rename rooms, etc.)

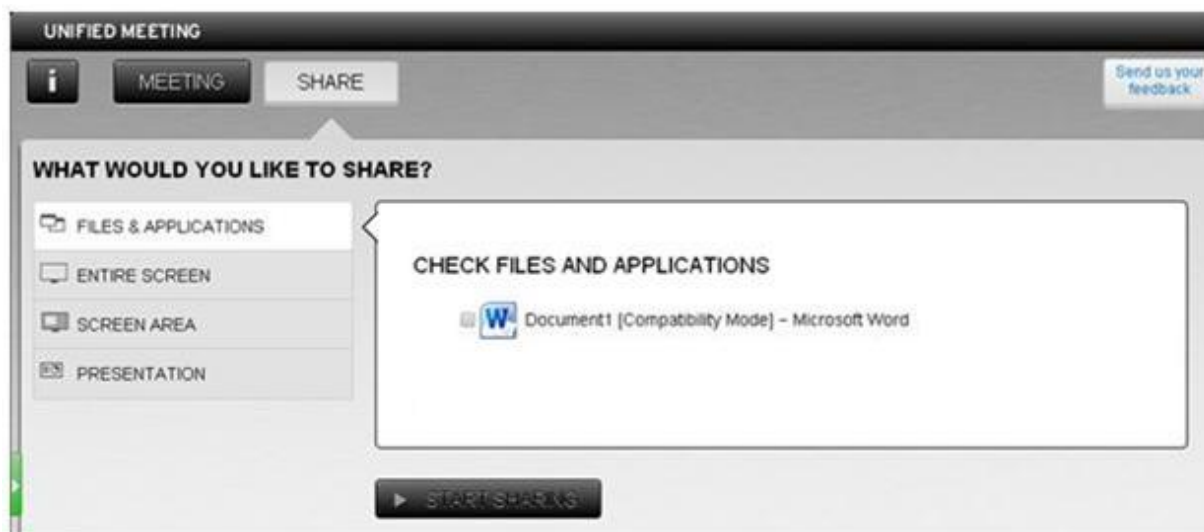


## Share Visuals

### Share an Application or Entire Desktop

Share and collaborate on files and applications with your participants directly from your desktop.

1. Click **Share** at the top left of the interface



2. Select what you would like to share from the left side menu.

**Files & Applications:** All applications currently open on your desktop and available for sharing will be listed. Select the file or application to share and click **Start Sharing** at the bottom of the interface.

**Entire Screen:** asks you to select a monitor, so that you can choose which monitor to share if you have more than one. Select the appropriate monitor and click **Start Sharing**

**Screen Area:** enables you to select an area of the screen to be shared. Once you have selected the area click **Start Sharing**

**Presentation:** enables you to browse your files and share PowerPoint presentations. Once you have the selected the presentation click **Start Sharing**.

### Pause Application Sharing

Moderators and Presenters can pause an application from being shared to the audience. Once paused, anything the moderator/presenter does on his desktop will not be seen by participants until sharing is continued.

To pause a shared application:

1. Click **Pause** next to 'Sharing' at the top right corner of the screen.
2. The icon will flash and 'Sharing' will change to 'Paused'.



To continue sharing:

Click **Pause** again and sharing will resume.

## Enhance Sharing

### Annotations

Allows presenter to annotate while sharing any application or slideshow. Ability to annotate on all applications being shared.

### Scaling & Resizing

Presenter and participants have the ability to collapse panels to increase the viewing area. Controls expand and collapse the left or right side of main meeting window.

### Zoom

Presenters and participants have the ability to zoom in on what is being shared. This coupled with the scaling and re-sizing tools works very well to ensure you do not miss any important information.

### Promoting Participants to Presenter

Participants can be promoted to a Presenter during a meeting so they can share content from their own computers.

To promote a participant to Presenter:

1. Right-click on the name of the participant you wish to promote.
2. Select **Promote to Presenter.**
3. The participant will receive a notification that they have been promoted to the role of Presenter.

To revoke control and demote a Presenter to participant, simply right click the participant's name and select **Demote to Participant.** Participants can also right-click on their own name to demote themselves from Presenter back to participant.

*Note: Participants must install the Unified Meeting 5 application in order to be promoted to Presenter.*

### Pass Sharing Control

Presenters can pass sharing control to participants during application or desktop share to control or edit content being shared by the moderator

1. Click on the participant card
2. Select the menu
3. Click **Pass Sharing Control.**

## Enhanced Meeting Features

Utilize a variety of powerful features to make your meeting more interactive and enrich the experience.

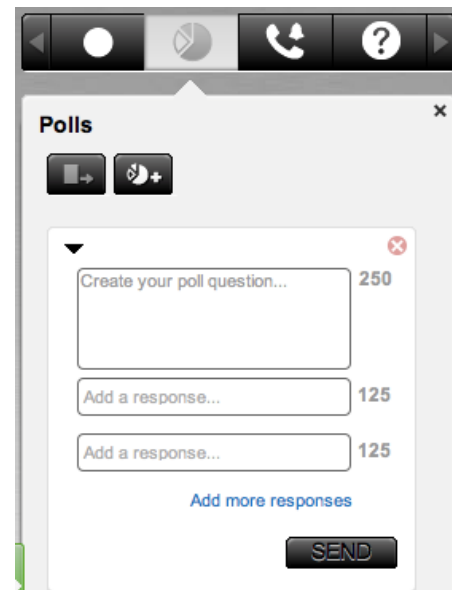
### Polls

Gather feedback, test your participants' knowledge and get quick results with polls.

### Name Replay

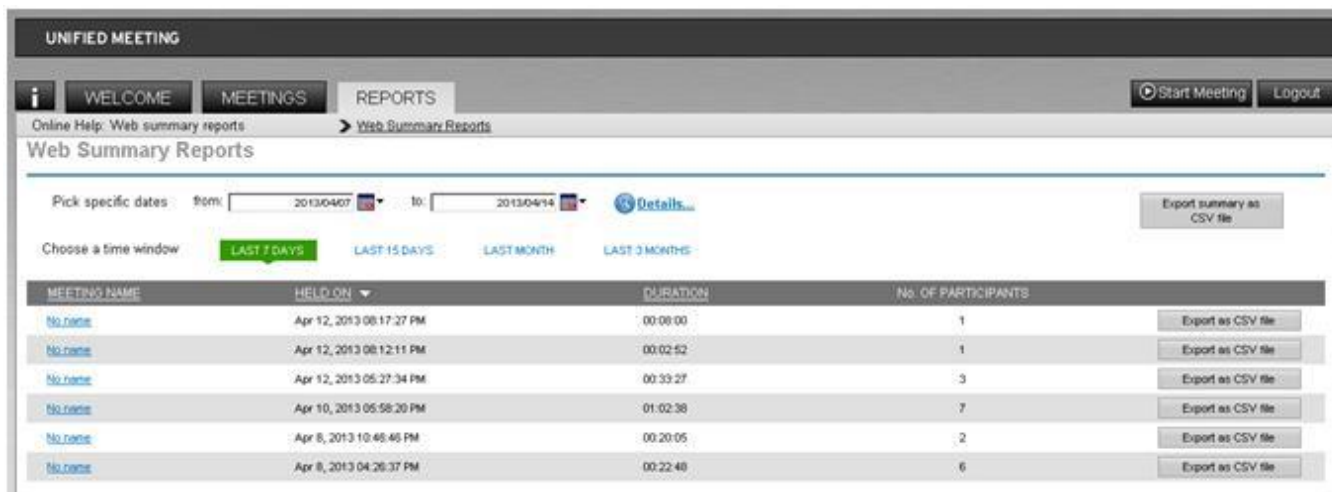
When a moderator right clicks on a participant's line in the Participant panel their recorded name will be replayed.

*Note: The Name Record setting must be enabled prior to the meeting on the Reservationless-Plus® audio platform.*




### Reports

Unified Meeting 5 stores detailed reports from your meetings, with information on the duration of the meeting, number of participants, participant names, etc. Click **Reports** in the Conference Manager to access meeting reports.



## Archiving

Extend the reach of your meeting by archiving it for future playback.

1. Click  in the toolbar menu.
2. Name the archive and select **Audio and/or Web**.
3. Click **Record**. The web recording will begin immediately.

The audio recording session will begin after you hear the voice prompt, “conference record has joined the conference” followed by a beep.

Participants will also see a pop up message on their web interface advising them that the session is being recorded. They will be given an option to continue or leave the meeting.

4. Click **Stop** to end the recording. You will hear the message “conference record has left the conference” on the audio meeting.
5. Your archives will be available after the meeting ends. They can be accessed via the Conference Manager, under ‘Meetings.’

*Note: Additional charges will apply.*



## Desktop Video

Moderators and meeting participants can broadcast video directly from their desktop web camera. Desktop Video is accessible to both installed and browser participants

To initialize, click  in the toolbar menu.


*Note: first time users may be required to install a Flash plug in.*

Participants can choose which broadcaster to view or enable Voice Activation/Recent Speaker capture.



## Customer Service and Support

### Technical Support and Account Assistance

<p><b>Technical support</b></p>	<p>877.769.7229 or +1 303.804.1813</p>
<p><b>Technical support during meeting</b></p>	<p>On your phone keypad:</p> <p>*0 (meeting) or 00 (individual)</p> <p>On the web:</p> <p>Click  in the Unified Meeting 5 interface and select the appropriate contact : Suggestions.</p>