

# Introduction to Collaborate Ultra

## Reference Guide

Edition 1.3  
August 2016  
Document Reference: 3862



## Contents

<b>Introduction .....</b>	<b>1</b>
<b>Logging In.....</b>	<b>2</b>
<b>The Participant Interface .....</b>	<b>3</b>
Session Menu .....	4
Collaborate Panel.....	5
My Settings.....	5
Chat.....	6
Participants List .....	7
Toolbar.....	7
Away.....	7
Audio .....	8
Video .....	8
Hand Raise.....	9
Participant Tasks Check-list .....	10
<b>The Moderator Interface .....</b>	<b>11</b>
Profile Picture.....	11
Permissions.....	11
Recording.....	12
Share Content .....	13
Whiteboard .....	14
Share Application.....	15
Share Files .....	16
Polling.....	18
Breakout Groups.....	19
Moderator Tasks Check-list.....	21
<b>Useful URLs.....</b>	<b>22</b>

If you require this document in an alternative format, such as large print, please contact Catherine Koppe in the Digital Skills and Training team by email [is.skills@ed.ac.uk](mailto:is.skills@ed.ac.uk) or phone 0131 6513233.

Copyright © Information Services 2016

Permission is granted to any individual or institution to use, copy or redistribute this document whole or in part, so long as it is not sold for profit and provided that the above copyright notice and this permission notice appear in all copies.

Where any part of this document is included in another document, due acknowledgement is required.



## Introduction

Collaborate is a virtual classroom/meeting tool which comprises audio, video, interactive whiteboard, file sharing, application sharing, polling, breakout groups and session recording.

Collaborate can be used by staff and students. It can be used for seminars, one-to-one meetings, tutorial space, student discussions or an informal chat. Collaborate is integrated with the University virtual learning environments (VLEs - Learn and Moodle) and MyEd.

Collaborate rooms are created within a VLE or MyEd. See the Collaborate website for instructions on how to create a Collaborate room in each system:

[www.ed.ac.uk/is/collaborate](http://www.ed.ac.uk/is/collaborate)

Once a room is created attendees may join the session either through the VLE or MyEd, or using a guest URL shared by a moderator.

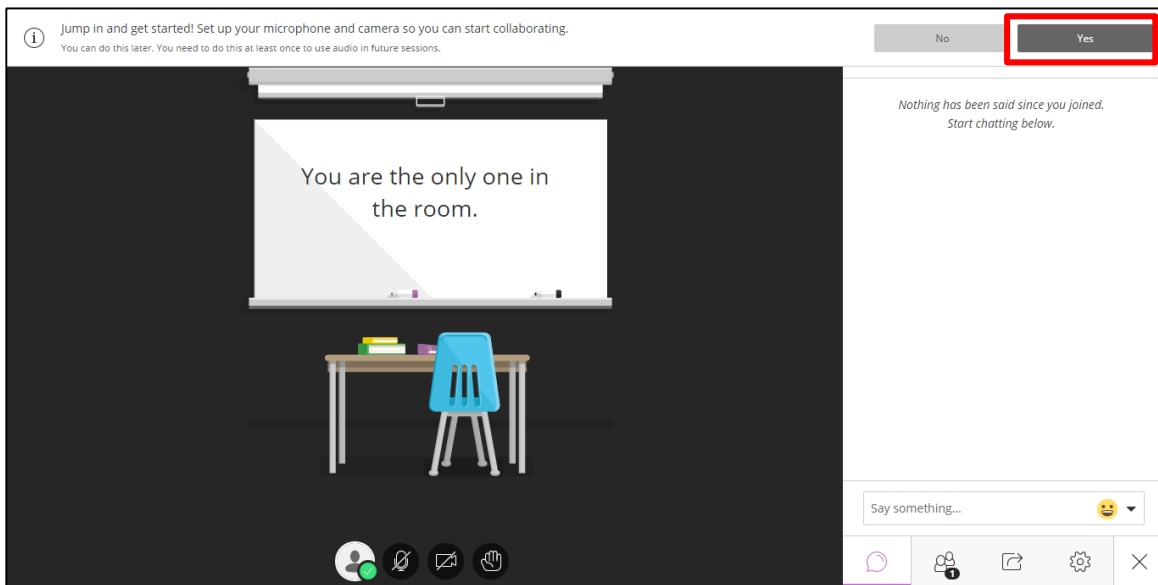
There are four roles that people may have within Collaborate, detailed in the table below. This guide will cover the features available to participants and moderators.

Role	Permissions
Moderator	Have full control over what is being shared. They can remove participants from a session but not moderators.
Presenter	Role is designed to allow students to present without giving them moderator privileges. Can upload, share, edit and stop sharing content. Can see hand raise notification and can lower hands.
Closed Captioner	Provides accessible learning experience for students who are deaf or hard of hearing, also for students whose native language is different from that being spoken in the session. The captioner types what is being said in real time.
Participant	The moderator of the session determines participants' privileges to use chat, video, audio, and draw on the whiteboard.

## Logging In

Collaborate Ultra works best using the Google Chrome web browser.

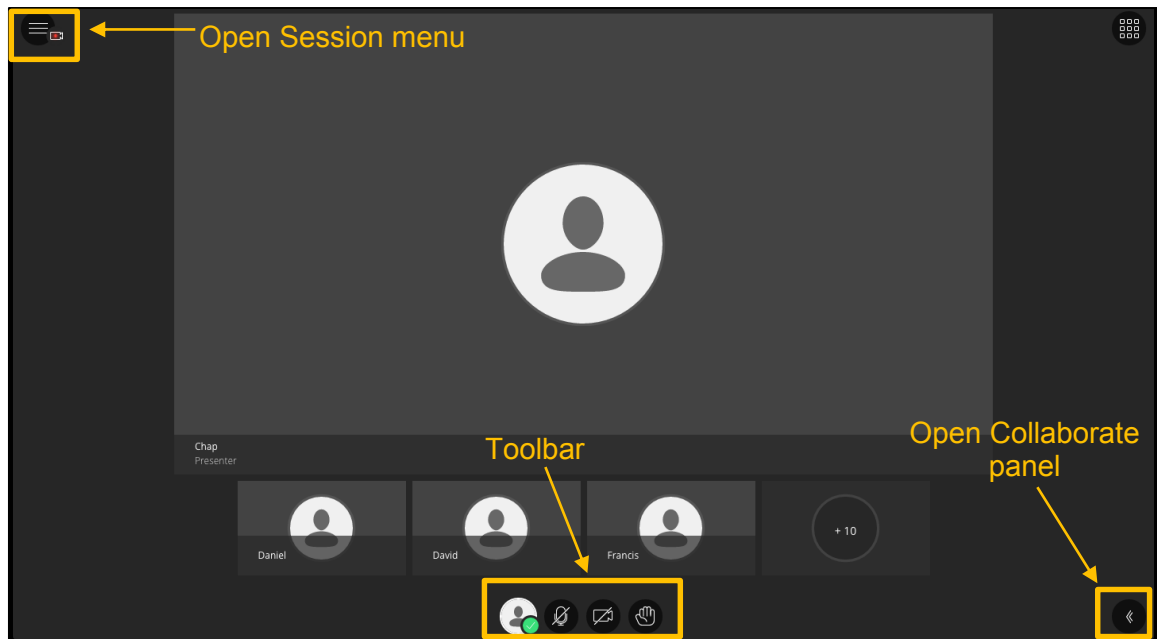
1. Make sure that your webcam and microphone are plugged in to the computer. We recommend using a USB headset microphone for better sound quality and ease of use.
2. Open the Collaborate room in Chrome. If you are logging in via MyEd or a VLE you will need to login there first, then click on the Collaborate room link. If you have been sent a guest link to a room you can copy and paste it into the Chrome address bar.
3. If you are joining the room as a guest you will be prompted to enter your name.
4. If this is your first time using Collaborate you will be offered a tour. Click **Begin The Tour** and work through the tour of Collaborate Ultra's features.



5. Click **Yes** in the white information bar at the top of the screen and work through setting up your microphone and camera.

By default your video is hidden and your microphone is mute after you complete the setup.

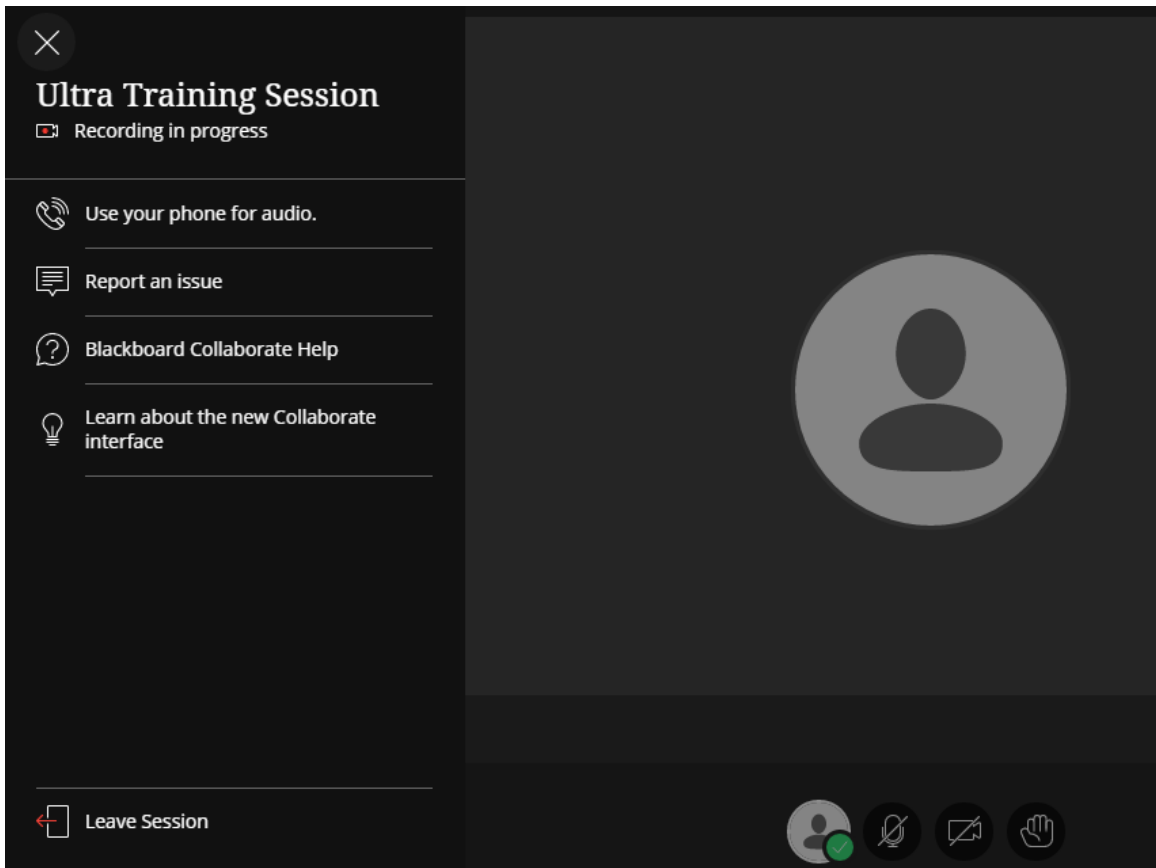
## The Participant Interface



Collaborate Ultra has a toolbar at the bottom centre of the screen, as well as buttons at the top left and bottom right to open the Session menu and Collaborate panel. The Collaborate panel on the right is open by default when you log in.

## Session Menu

The Session menu opens on the left of the screen. As a participant this menu will mainly be used to see if recording is in progress, or to leave the session.



6. Click on the **Open Session menu** button (three horizontal lines) at the top left of the screen.
7. Click on the **X** at the top left to close the Session menu.



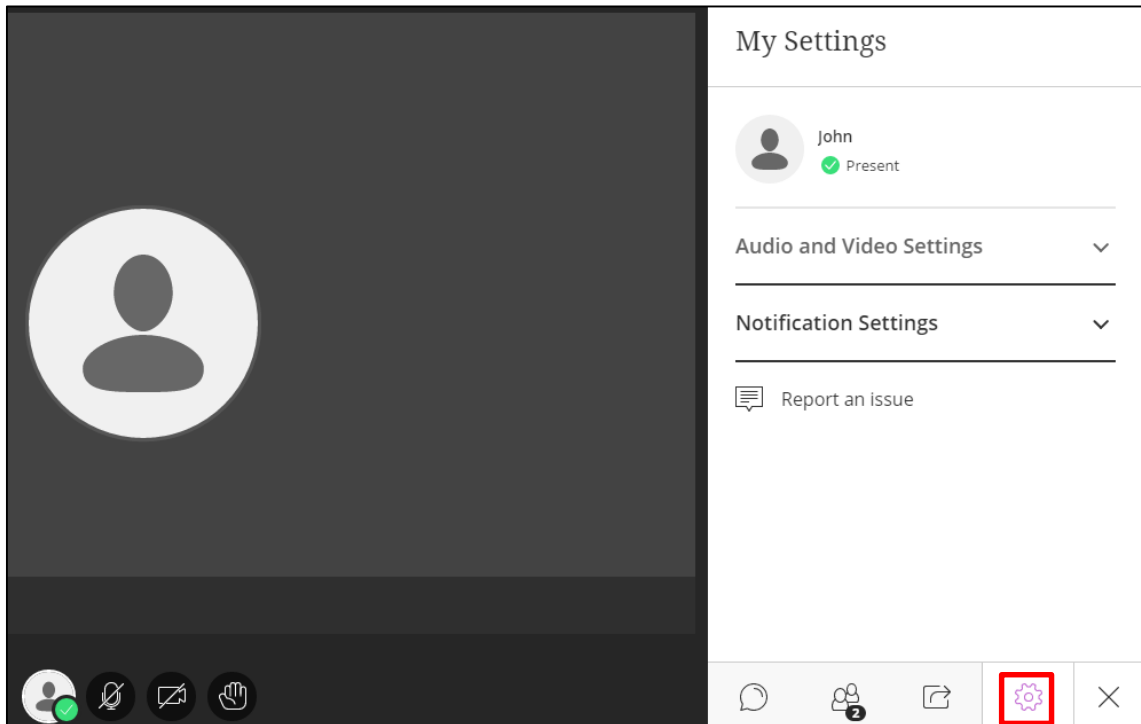
## Collaborate Panel

The Collaborate panel opens on the right of the screen. This panel has tabs for chat, participants list, share content, and settings.

8. If the Collaborate panel is not already open, click on the button in the bottom right corner of the screen to open it.

## My Settings

9. Click on the **My Settings** (cog) tab at the bottom of the Collaborate panel to switch to the **My Settings** tab.



### Audio and video settings

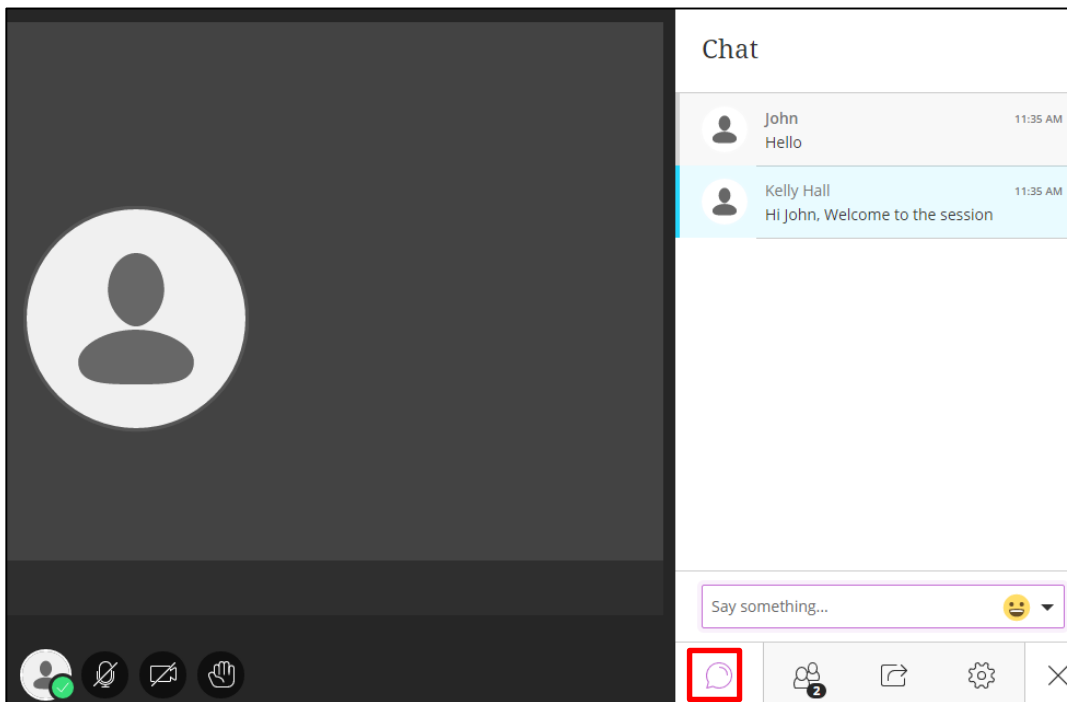
If you need to re-run the camera and microphone set-up (see “Logging In”), or adjust the speaker or microphone volume, you can do so here.

### Notification settings

You can toggle notifications for when someone enters or leaves the room, posts a chat message and closed captioning.

10. Click on **Notification Settings** and choose how you’d prefer to be notified during the session. You may need to scroll down to find the **Notification Settings** option (or click on **Audio and Video Settings** to minimise it).

## Chat

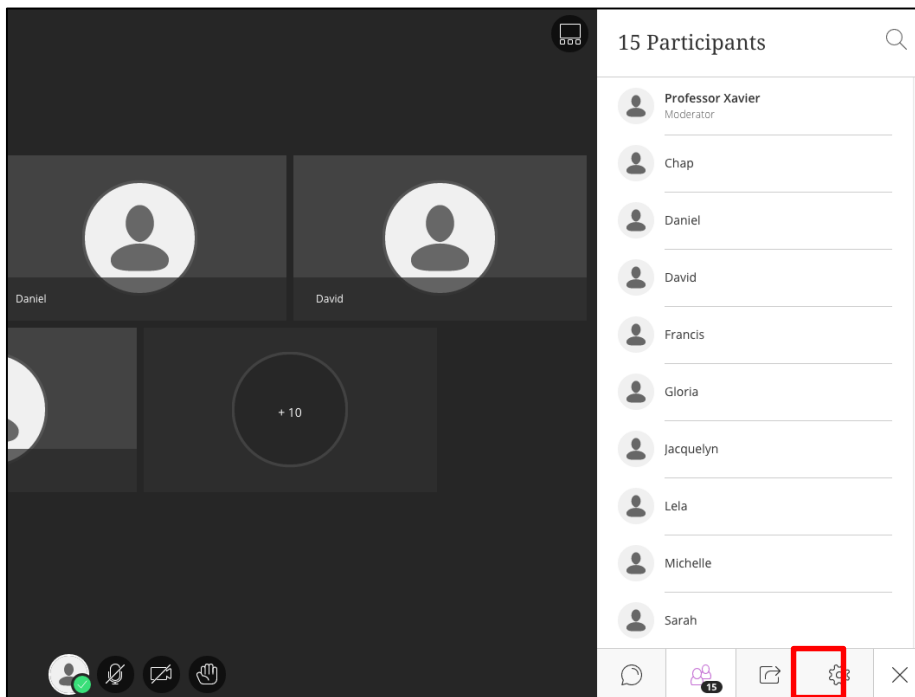


11. Click on the **Open Chat** tab at the bottom of the Collaborate panel to open the chat tab.
12. Type in the **Say something...** box. Press **[Enter]** to send your message to everyone in the room.
13. Click on the **Emoticon** (smiley face) button, select an emoticon and press **[Enter]** to send it to the room.
14. Type or paste a URL into the **Say something** box, and press **[Enter]** to send a clickable link to the room.

You cannot see any conversation that takes place when you are not in the room.

**Tip:** If your Chat tab is not open a red number appears on the **Open Chat** button at the bottom of the Collaborate panel when a new message arrives. The message also appears briefly to the left of the Collaborate panel.

## Participants List



15. Click on the **Open Participants List** tab at the bottom of the Collaborate panel to see a list of all the people in the room.

You will see each participant's name, profile picture and role. Your name is highlighted in bold. Moderators are listed at the top, ordered alphabetically. Participants are listed under the horizontal rule, ordered alphabetically.

16. Click on the **X** at the bottom right close the **Collaborate Panel**.

## Toolbar

### Away

It is good practice to let everyone else in the room know if you have to leave your computer during a session, you can do this by setting your status as "away".



17. Click on the **Set as Away** button (green tick) on the Collaborate toolbar. It will turn yellow to indicate that you are away from the computer.

18. Click on the **I'm back!** button when you are ready to re-join the session.

## Audio



19. To turn audio on, click on the **Share Audio** button on the Collaborate toolbar. The button will turn **green** to show the microphone is active.
20. Speak into the microphone and check that the other people in your room can hear you.
21. Turn audio off by clicking again on the **Share Audio** button.

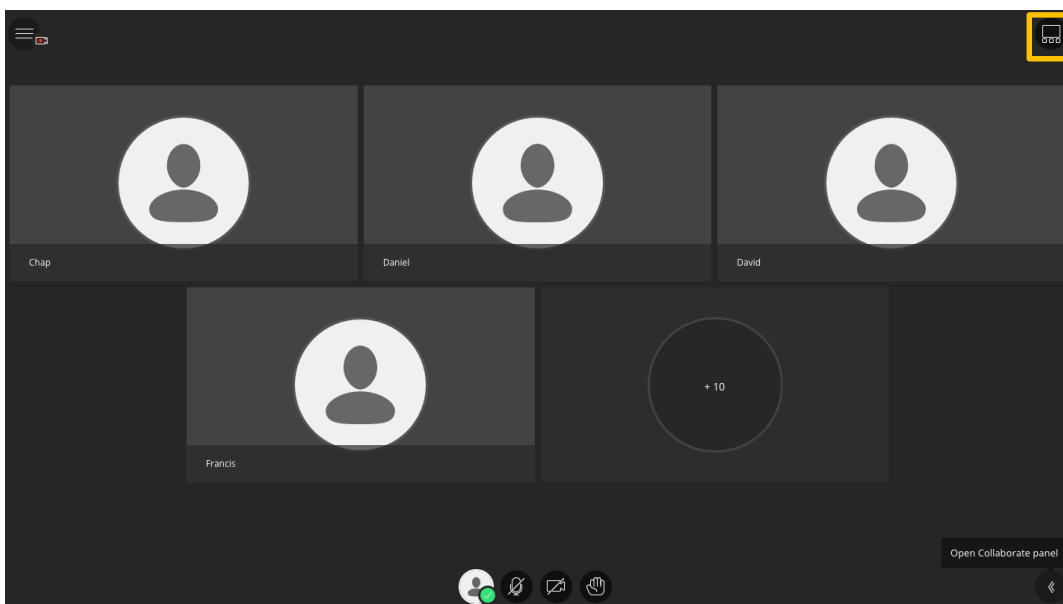
It is important to deactivate the audio button when you have finished speaking because it can be distracting for other people in the room if you leave your audio on when you are not speaking.

**Tip:** Press **Alt + M** to toggle the audio on and off.

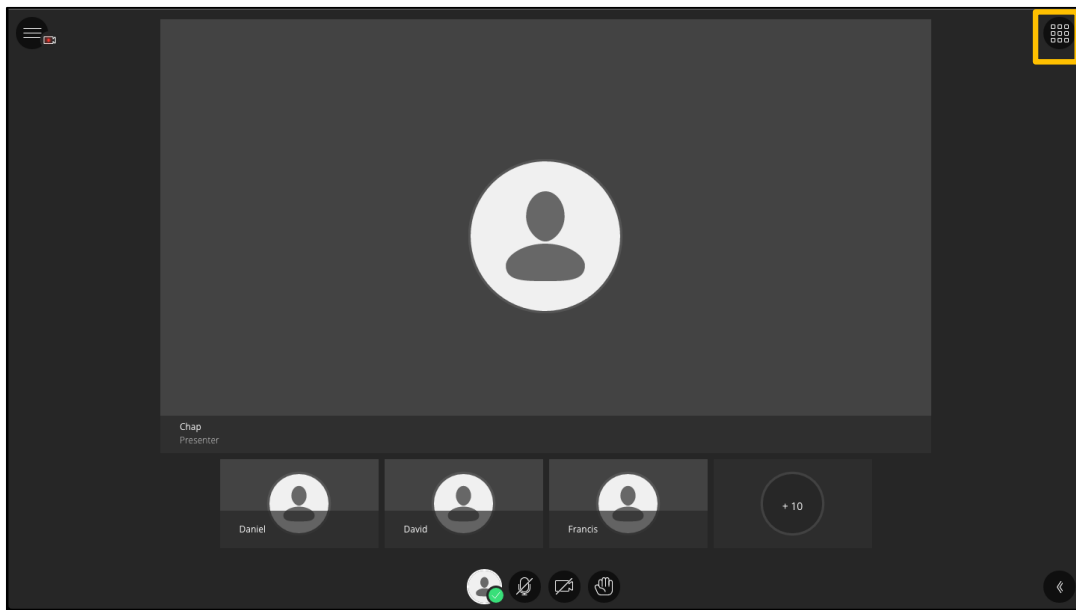
## Video



22. To turn video on, click on the **Share Video** button on the Collaborate toolbar. You will see a video preview, click **Share Video** here too. The **Share Video** button on the toolbar will turn blue to show that the camera is active.
23. Providing there are more than two people in the room, the video will be in **Group Mode** by default. Click on the button at the top right corner to switch to **Follow the Speaker** mode.



24. Click on the top right button again to switch back to group mode.



25. Turn video off by clicking again on the **Share Video** button in the toolbar.

**Tip:** Press **Alt + C** to toggle the video on and off.

## Hand Raise



The **Put hand up** button is used to ask a question. It puts a number against the participant's name in the Participants List in the order that they raised their hands. People with raised hands move to the top of the Participants List.

26. Click on the **Put hand up** button in the Collaborate toolbar to raise your hand.

27. Click on the button again to lower your hand.

**Tip:** Press **Alt + H** to raise or lower your hand.

## Participant Tasks Check-list

### Session menu

Find the Leave Session button (don't press it)	
--	--

### Collaborate panel

Set up camera and microphone	
Adjust speaker and microphone volume	
Open the Chat tab	
Send a chat message to the room	
Use an emoticon	
Share a URL	
Open the Participants List	
Close the Collaborate panel	

### Status

Set status as away	
--------------------	--

### Audio

Turn on microphone	
Speak into microphone	
Turn off microphone	

### Video

Turn video on	
Switch between group mode and follow speaker mode	
Turn microphone on and speak in follow speaker mode	
Turn video and microphone off	

### Raise Hand

Raise and lower your hand	
---------------------------	--

## The Moderator Interface

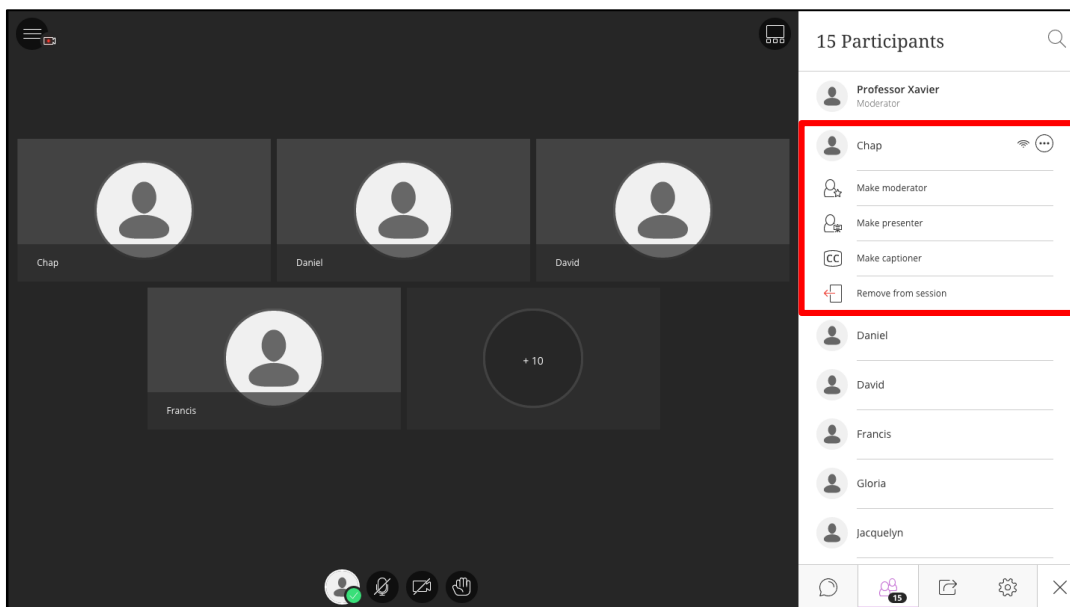
### Profile Picture

Your profile picture, name and present/away status are displayed at the top of the **My Settings** tab in the **Collaborate** panel.

1. To change your profile picture, click on your picture in the **My Settings** tab.
2. Drag and drop or upload a photo. Click **I like it!**, then **Save** to save the new profile picture.

**Tip:** By default participants do not show a profile picture. Moderators can change this permission in **Session Settings** on the **My Settings** tab.

### Permissions



Moderators can promote or demote participants into different roles:

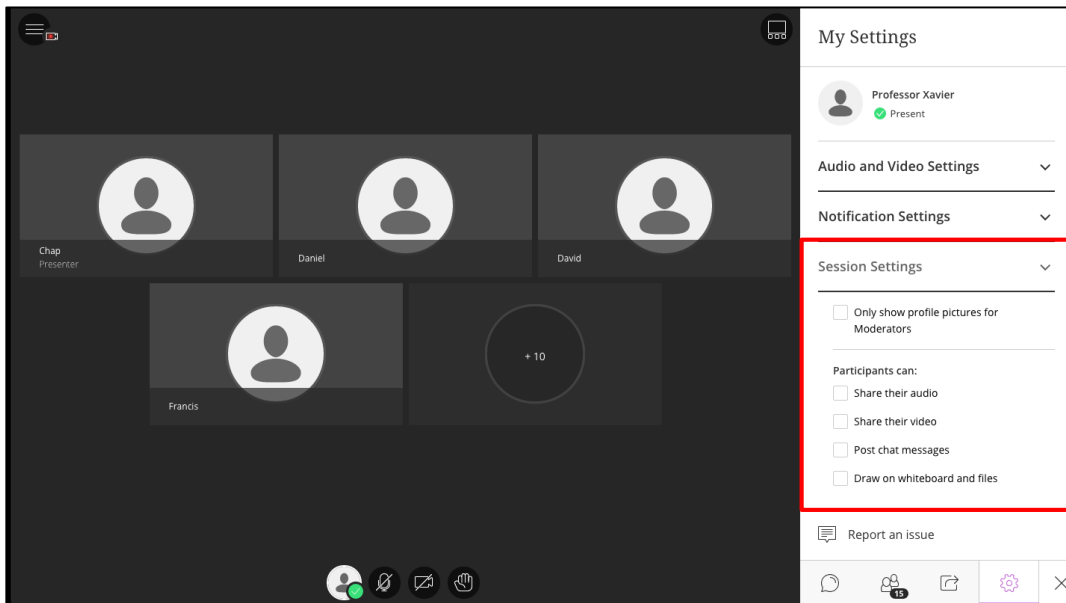
3. Open the Collaborate Panel and then open the Participants List.
4. To promote a participant to a moderator, click on the participant's name and choose **Make Moderator**.
5. To change them back to a participant, click on the moderator's name and choose **Make Participant**.
6. Close the **Collaborate** panel.

Moderators can remove a participant from the room:

7. Open the **Participants List** and click on the name of the person you want to remove.
8. Choose **Remove from session**.

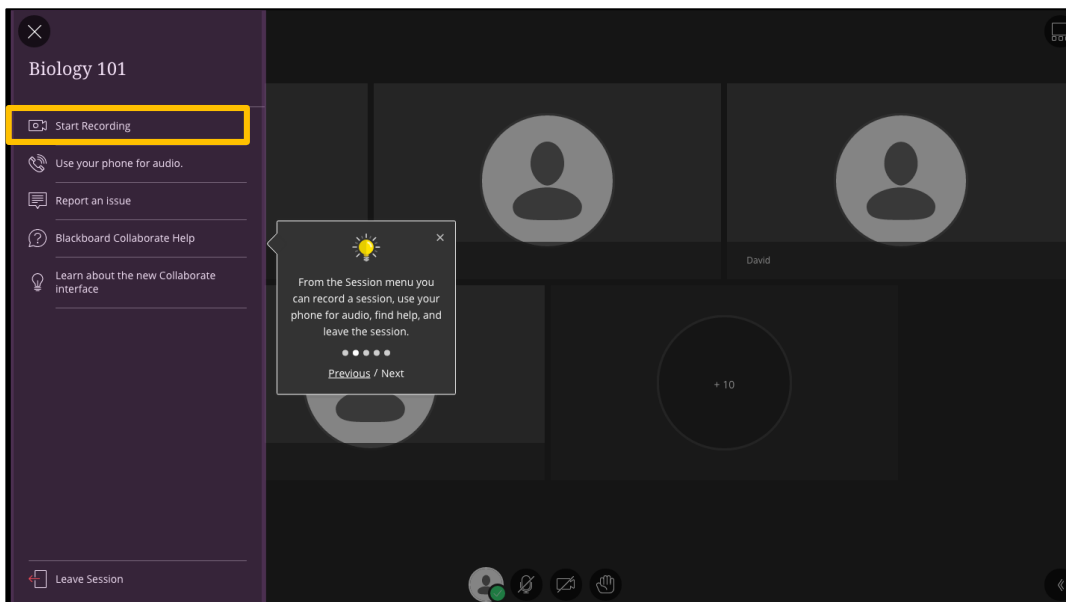
Moderators can choose which tools participants have access to:

9. Open the **Collaborate Panel**, **My Settings** tab and then click to expand **Session Settings**.



10. Here you can choose to disable or enable audio, video, chat, and drawing on whiteboard for all participants in the session.

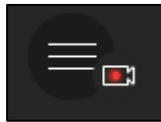
## Recording



11. To start recording, open the **Session menu** then choose **Start Recording**.
12. Close the Session menu.



When a recording is started a camera icon will appear in in the **Session Menu** button:



All activity in the main room will be recorded except chat messages.

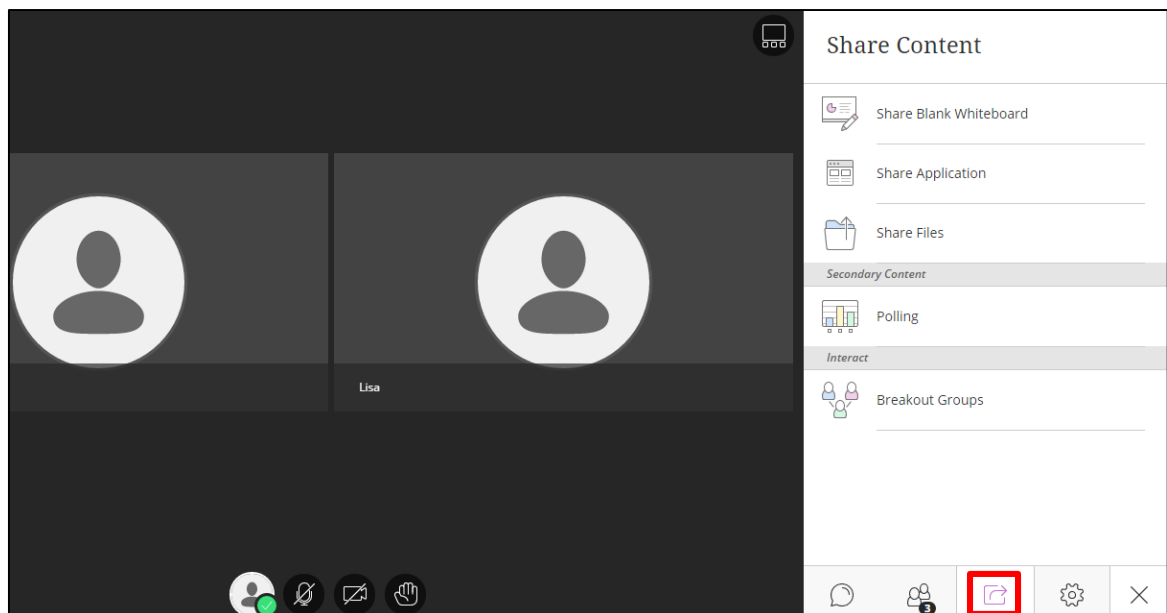
13. To pause or stop the recording open the **Session menu**, then choose **Stop Recording**.

You can view a recording by clicking on the recording link which will appear in the integration that you set up your session in, either Learn, Moodle or MyEd. All recordings are MP4 files.

Delete recordings when they are no longer required in order to save space on the server. Be aware that recordings will be deleted once a year (in the summer) in accordance with the University's Collaborate Storage Management Policy, which is available to read on the University's Collaborate website ([www.ed.ac.uk/is/collaborate](http://www.ed.ac.uk/is/collaborate)). Two months notification of deletion will be given.

**Tip:** Only record a session when it is required, and make sure you consider potential confidentiality and copyright issues when using recordings.

## Share Content

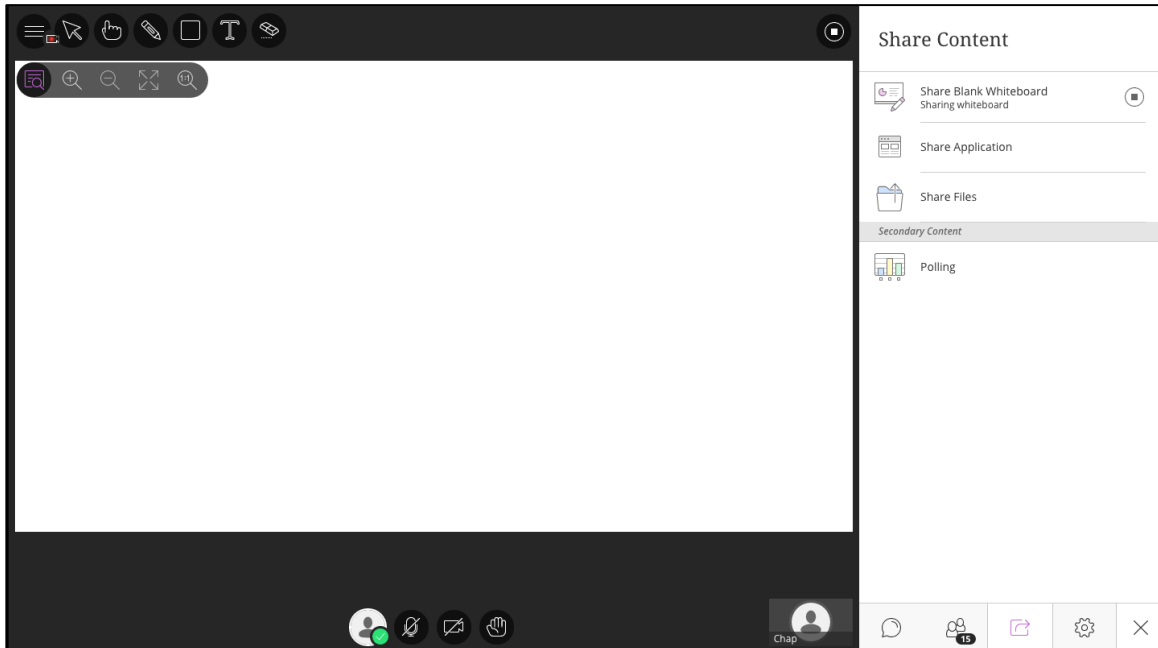


There are five items in the **Share Content** tab on the **Collaborate Panel**:

1. Whiteboard
2. Share Application
3. Share Files (including presentations)
4. Polling
5. Breakout Groups

## Whiteboard

You can collaborate with other people in the session using the Whiteboard.



The whiteboard has 6 content tools:



**Tip:** The **Clear** button clears everything on the whiteboard. To delete a single item, select it using the **Select** tool, then press **[Delete]**.

The whiteboard also has 4 view controls:



14. To open the whiteboard, click on the **Share Content** tab in the **Collaborate** panel and choose **Share Blank Whiteboard**.
15. Use the content tools to draw on the whiteboard.
16. Click the **Stop sharing whiteboard** button on the **Share Content** tab to close the whiteboard.



**Tip:** Once you have closed a whiteboard you cannot reopen it. The contents are lost.

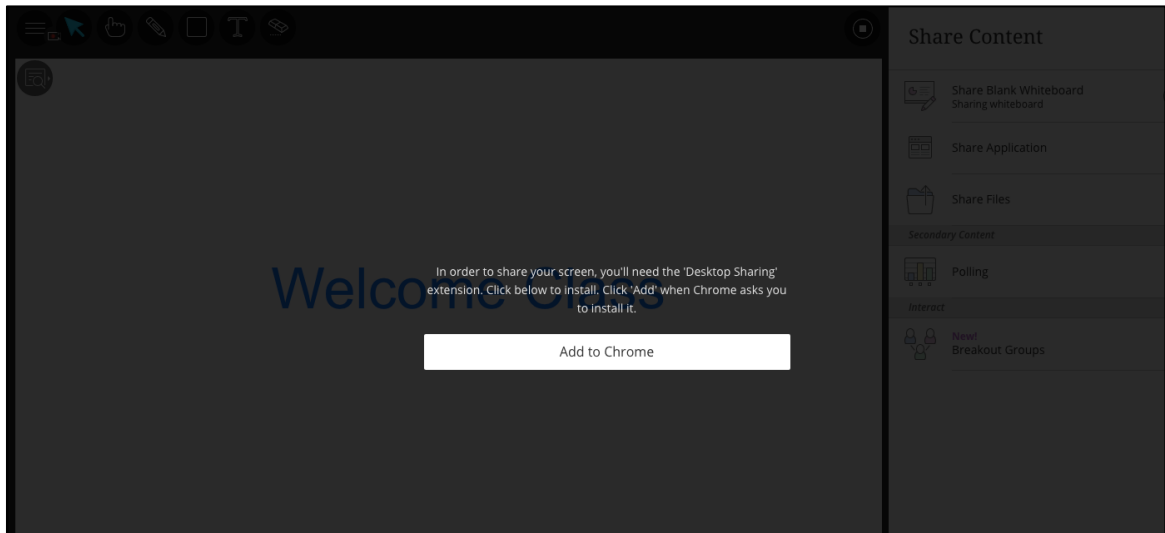
## Share Application

Application sharing allows you to share a program or your entire desktop with the other people in the session. **It is only available in Google Chrome.** You must have the program already open on your computer before you start application sharing.

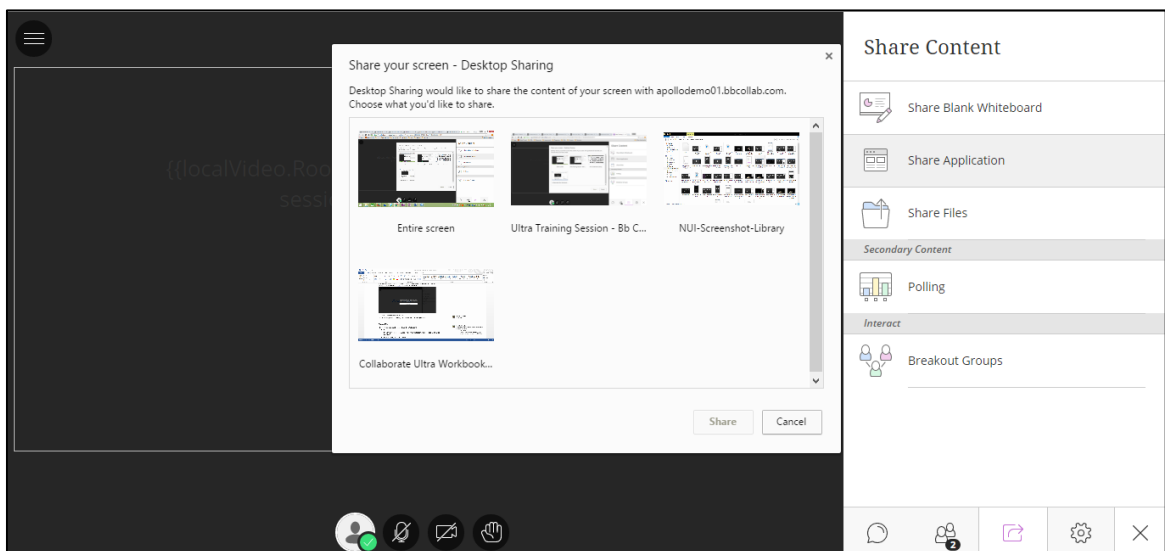
17. Open the program you want to share.

18. In Collaborate, click on the **Share Content** tab on the **Collaborate** panel and choose **Share Application**.

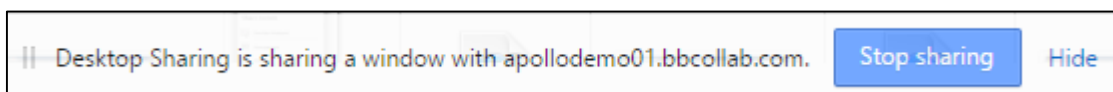
19. The first time you use application sharing in your Google Chrome browser you will be prompted to download a plugin, click **Add to Chrome**.



20. Select the application to share.



21. To stop application sharing, click on the **Stop Sharing** button.



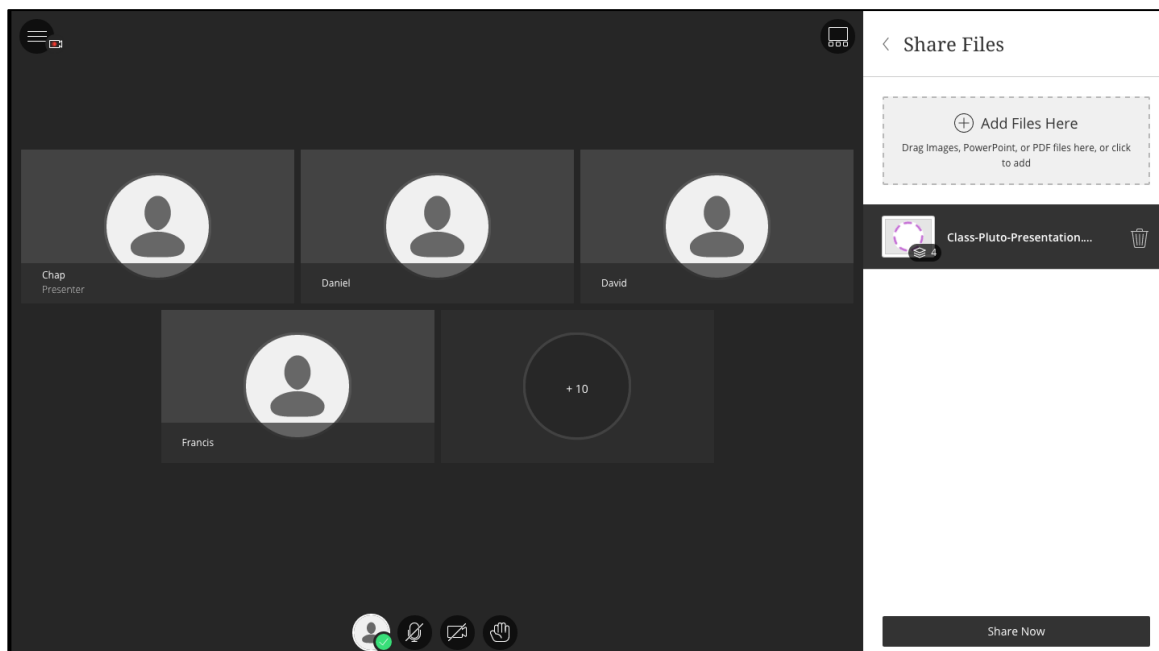
## Share Files

The following files can be loaded into the Whiteboard:

- PDFs
- PowerPoint slides - .ppt, .pptx (max 60MB but recommend to keep as small as possible)
- Images - GIF, JPEG and PNG

Each slide becomes a separate Whiteboard page as a static image in the background.  
**Any animations or active links are lost.**

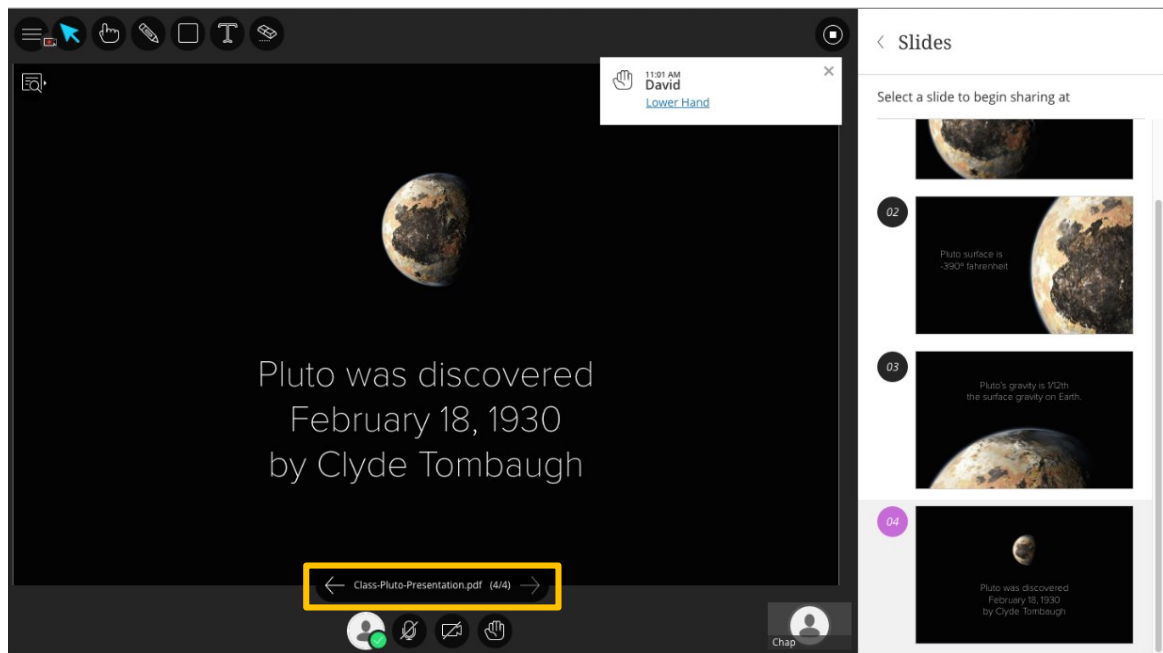
**Tip:** If your PowerPoint presentation has animations use **Share Application** instead of **Share Files**. Choose **Entire Screen** or make sure your presentation is in Slide Show mode before sharing it as an application.



22. To load a presentation, click the **Share Content** button and choose **Share Files**.

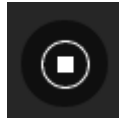
23. Click on **Add Files Here** or drag a file into the box to upload it.

24. Click **Share Now**, then select a slide for participants to see it.



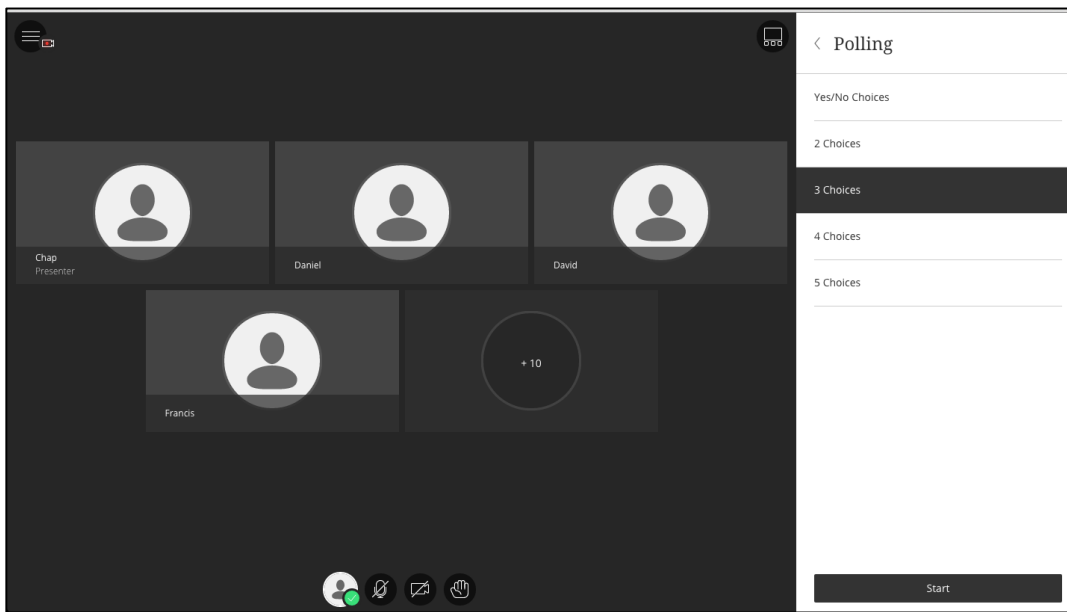
25. Once the slides have been loaded you will be able to navigate using the arrows at the bottom of the presentation (as shown above), or by clicking on slides in the panel on the right.

26. Click the **Stop Sharing** button at the top right of the presentation to stop sharing it.



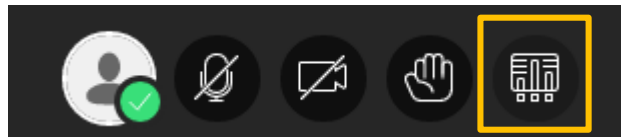
All loaded files are automatically removed at the end of a session (including Whiteboard pages).

## Polling



Polling allows participants to respond to a question.

27. Click the **Share Content** tab in the **Collaborate** panel and choose **Polling**. Select the number of choices you want in your poll, then **Start**.
28. Select your answer to the poll.
29. When all the participants have had time to answer, click on the **View Poll** button in the toolbar.



30. Click **Show Responses** to make the responses visible to the participants. Once you have clicked this no-one else will be able to answer.
31. Click **Hide Responses** hide the responses from the participants.
32. When you have finished polling, click on the **End Polling** button to close the poll.



## Breakout Groups

Breakout groups can be used to move participants into different groups where they can use the whiteboard, application share, share files and use polling. Audio, video and text chat is private within the group. Moderators can move between breakout groups and the main room. Participants cannot move themselves unless the moderator has chosen the “allow participants to switch groups” option.

Can choose random or custom assignment

Moderators can be part of the group or can move themselves later

Can reassign participants

Allow participants to switch groups if needed

Moderator will stay in the Main Room

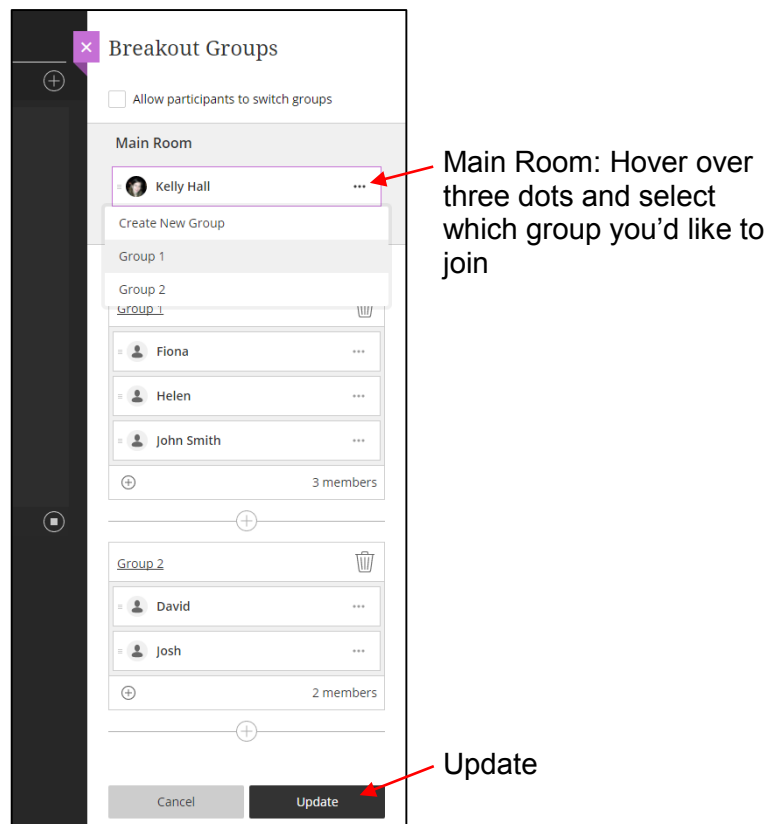
Group 1 participants

Start breakout groups

33. To create breakout groups, go to the **Share Content** tab, and choose **Breakout Groups**. Select **Randomly assign** in the **Assign Groups** menu, then click the **Start** button.

**Tip:** If you select **Custom assignment** in the **Assign Groups** menu you get to choose who goes in which group.

34. To move yourself to a breakout group, click the **Share content** button, then **Breakout Groups**. Find your name in the **Main Room**, hover over the three dots and select which group you'd like to join. Click the **Update** button.



35. To move a participant to a different breakout group, go to the **Share content** tab and click **Breakout Groups**. Find the participant and click on three dot button to the right of their name, choose the group you want to move them to and click **Update**.
36. To return everyone to the main room, go to the **Share content** tab and click **Breakout Groups**. Click the plus sign under **Main Room**, select **Move everyone here**, click **Update**.
37. To close the breakout groups, go to the **Share content** tab and click **Breakout Groups**. Click the **End Breakout Groups** button.



**Tip:** You can also move yourself and participants between breakout groups and close the breakout groups from the **Participants** tab.



## Moderator Tasks Check-list

### Profile Picture

Set a profile picture	
-----------------------	--

### Permissions

Promote/demote participants to moderator/participant	
Change tool permissions for all participants	
Find where to remove a participant from the room (but don't do it)	

### Recording

Start and stop/pause the recording	
------------------------------------	--

### Whiteboard

Open the whiteboard	
Draw on the whiteboard	

### Share Application

Start application sharing	
Stop sharing	

### Share Files

Load content into share files	
Navigate the presentation	
Stop sharing the presentation	

### Polling

Start a poll	
Select your answer	
Show responses	
Hide responses	
End polling	

### Breakout Groups

Create breakout groups	
Move yourself to a breakout group	
Move a participant to a different breakout group	
Return everyone to main room	

## Useful URLs

Blackboard Collaborate Support Portal:

<https://en-us.help.blackboard.com/Collaborate/Ultra>

Information Services' Collaborate webpages. The pages include:

- Guides for setting up Collaborate rooms in MyEd, Learn and Moodle
- The Collaborate recordings storage management policy
- Moderator check list
- Example instructions to send to participants
- Example etiquette slides
- Using Collaborate on a mobile device

<http://www.ed.ac.uk/is/collaborate>