# Contents

<table>
<thead>
<tr>
<th>Introduction</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logging In</td>
<td>2</td>
</tr>
<tr>
<td>The Participant Interface</td>
<td>3</td>
</tr>
<tr>
<td>Session Menu</td>
<td>4</td>
</tr>
<tr>
<td>Collaborate Panel</td>
<td>5</td>
</tr>
<tr>
<td>My Settings</td>
<td>5</td>
</tr>
<tr>
<td>Chat</td>
<td>6</td>
</tr>
<tr>
<td>Attendees</td>
<td>7</td>
</tr>
<tr>
<td>Private chat</td>
<td>7</td>
</tr>
<tr>
<td>Toolbar</td>
<td>8</td>
</tr>
<tr>
<td>Status</td>
<td>8</td>
</tr>
<tr>
<td>Audio</td>
<td>10</td>
</tr>
<tr>
<td>Video</td>
<td>10</td>
</tr>
<tr>
<td>Hand Raise</td>
<td>11</td>
</tr>
<tr>
<td>Participant Tasks Check-list</td>
<td>12</td>
</tr>
<tr>
<td>The Moderator Interface</td>
<td>13</td>
</tr>
<tr>
<td>Permissions</td>
<td>13</td>
</tr>
<tr>
<td>Recording</td>
<td>14</td>
</tr>
<tr>
<td>Share Content</td>
<td>15</td>
</tr>
<tr>
<td>Whiteboard</td>
<td>16</td>
</tr>
<tr>
<td>Share Application/Screen</td>
<td>17</td>
</tr>
<tr>
<td>Share Camera</td>
<td>19</td>
</tr>
<tr>
<td>Share Files</td>
<td>20</td>
</tr>
<tr>
<td>Polling</td>
<td>22</td>
</tr>
<tr>
<td>Breakout Groups</td>
<td>24</td>
</tr>
<tr>
<td>Moderator Tasks Check-list</td>
<td>26</td>
</tr>
<tr>
<td>Further Resources</td>
<td>27</td>
</tr>
</tbody>
</table>
Introduction

Collaborate is a virtual classroom and 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 sessions are created within a VLE or MyEd. See the Collaborate website for instructions on how to create a Collaborate session in each system: https://www.ed.ac.uk/is/collaborate

Once a session is created attendees may join the session either through the VLE, 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.

<table>
<thead>
<tr>
<th>Role</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moderator</td>
<td>Have full control over what is being shared. They can remove participants from a session but not moderators.</td>
</tr>
<tr>
<td>Presenter</td>
<td>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.</td>
</tr>
<tr>
<td>Closed Captioner</td>
<td>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.</td>
</tr>
<tr>
<td>Participant</td>
<td>The moderator of the session determines participants’ privileges to use chat, video, audio, and draw on the whiteboard.</td>
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</table>
Logging In

Collaborate Ultra works best using the Google Chrome web browser. Most laptops have built-in webcams and microphones. We recommend using a USB headset microphone for better sound quality and ease of use. If you are using a desktop computer you will probably need a USB webcam if you want to share video.

1. Open the Collaborate session in Chrome. If you are accessing the session via MyEd or a VLE you will need to login there first, then click on the Collaborate session link. If you have been sent a guest link you can copy and paste it into the Chrome address bar.

2. If you are joining the session as a guest you will be prompted to enter your name.

3. You may be asked to allow the browser to use your microphone and/or your camera. After accepting these, you will then be given the chance to choose and test your microphone and camera before entering the session.

4. If this is your first time using Collaborate you will be offered a short tour. Click Start Tutorial and work through the tour of Collaborate Ultra's main areas.

5. If you want to repeat the tutorial, or see another one on using the Chat feature, go to the Session Menu (top left) and choose Tell me about Collaborate.

Your video and microphone are muted when you first enter a session.
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.
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, repeat the tutorials, or to leave the session.

1. Click on the **Open Session Menu** button (three horizontal lines) at the top left of the screen.
2. 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, attendees, share content, and settings.

1. 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
2. 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”) you can do so here.

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

3. 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).

Profile Picture
Your profile picture and name are displayed at the top of the My Settings tab.

4. To change your profile picture, click on the picture next to your name in the My Settings tab.
5. Choose to upload a photo or capture one from your camera. Move and adjust the grid to centre and/or crop the image. When happy, click I like it!, then Save. By default your profile picture is saved and re-used the next time you use Collaborate.

**Tip:** If you are not able to set a profile picture it may be that a moderator has turned off profile pictures for the session. Moderators can change this permission in Session Settings on the My Settings tab.

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**Chat**

6. Click on the Chat tab at the bottom of the Collaborate panel to open the chat area.
7. Click on Everyone to enter the main chat area for the session.
8. Type in the Say something box. Press [Enter] to send your message to everyone in the session.
9. Click on the Emoticon (smiley face) button, select an emoticon and press [Enter] to send it to the session.
10. Type or paste a URL into the Say something box, and press [Enter] to send a clickable link to the session.

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

**Tip:** If your Chat tab is not open, a red number appears on the 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, if you have allowed Collaborate pop-up notifications in the Notification Settings.
Introduction to Collaborate Ultra

Attendees

11. Click on the Attendees tab at the bottom of the Collaborate panel to see a list of all the people in the session.

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 in a separate section, ordered alphabetically.

12. Click on the X at the bottom right close the Collaborate Panel.

Tip: You can detach the Attendees tab so that it can be viewed at the same time as another tab. To do this select the More Options (three dots) button at the top right of the Attendees tab and choose Detach panel. Use the same button to re-attach the panel.

Private chat

13. Find the person you want to chat with on the Attendees tab. Click on the Attendee Controls (three dot) button to the right of their name and choose Send a chat message.

The side panel will switch to the Chat tab in a private chat with the chosen person.
14. To view a list of your chats, click the **Previous Panel** (\(<\)) button at the top left of the Chat panel.

15. Select **Everyone** in the list of chats to return to the main session chat.

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**Toolbar**

**Status**

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

1. Click on the **My Status and Settings** button (avatar with a green tick) on the Collaborate toolbar and click on **Away** on the pop-up that appears. It will turn to a yellow clock to indicate that you are away from the computer.

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

3. You can also share feedback with other people in the session. Again click on the **My Status and Settings** button on the Collaborate toolbar and select one of the feedback options.
The feedback icon will be displayed next to your name on the Attendees tab for 30 seconds. During this time it is visible to all attendees.

2 Attendees

| 1 |

Participants (2)

| Bernard |
| Cath |
Audio

4. 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.

5. Speak into the microphone and check that the other people in your session can hear you.

6. 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 session if you leave your audio on when you are not speaking.

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

Video

7. 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.

8. Providing there are more than two people in the session, the video will be in **Group Mode** by default. Click on the button at the top right corner to switch to **Current Speaker** mode.
9. Click on the top right button again to switch back to group mode.

10. 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 **Raise hand** button can be used if you want to ask a question. It lists participants’ names in the Attendees tab in the order that they raise their hands. People with raised hands move to the top of the Attendees tab.

11. Click on the **Raise hand** button in the Collaborate toolbar to raise your hand.
12. 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 Collaborate tutorials

#### Collaborate panel
- Find where you can re-run the camera and microphone set-up
- Check your notification settings
- Add a profile picture
- Open the Chat tab
- Send a chat message to everyone in the session
- View the list of Attendees
- Detach the Attendees tab to a separate panel and then re-attach
- Send a private chat message to another attendee
- Close the Collaborate panel

#### Toolbar
- Set status as away
- Set status to one of the Feedback options and observe in the Attendees tab
- Turn on microphone and speak
- Turn off microphone
- Share video
- Switch between group mode and follow speaker mode
- Stop sharing video
- Raise and lower your hand

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The Participant Interface
The Moderator Interface

Permissions

Moderators can promote or demote participants into different roles:

1. Open the **Collaborate Panel** and then open the **Attendees** tab.
2. To promote a participant to a moderator, click on the **Attendee Controls** button (three dots) next to the participant's name and choose **Make moderator**.
3. To change them back to a participant, click on the **Attendee Controls** button next to their name and choose **Make participant**.

Moderators can remove a participant from the session:

4. Open the **Attendees** tab and click on the **Attendee Controls** button next to the name of the person you want to remove.
5. Choose **Remove from session**.
Moderators can choose which tools participants have access to:

6. Open the My Settings tab on the Collaborate Panel and then click to expand Session Settings.

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

Recording

1. To start recording, open the Session menu then choose Start Recording.
2. Close the Session menu.
When a recording is started a camera icon will appear on the **Session menu** button:

![Camera Icon]

The audio and content in the main screen area will be recorded.

3. 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 downloaded recordings are MP4 files. Recordings can also be viewed online via the VLE integrations – these recordings also record messages in the **Everyone** chat area.

**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 six items in the **Share Content** tab on the **Collaborate Panel**:

1. Share Blank Whiteboard
2. Share Application/Screen
3. Share Camera
4. Share Files (including presentations)
5. Polling
6. Breakout Groups
Whiteboard

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

The whiteboard has 6 content tools:

- Select
- Pointer
- Pencil
- Shapes (rectangle, ellipse, line)
- Text
- Clear

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

The whiteboard also has 4 view controls:

- Zoom in
- Zoom out
- Best fit
- Actual size

1. To open the whiteboard, click on the Share Content tab in the Collaborate panel and choose Share Blank Whiteboard.
2. Use the content tools to draw on the whiteboard.
3. 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/Screen

Application sharing allows you to share a program or your entire desktop with the other people in the session. **Full sharing functionality is only available in Google Chrome** but you can share your desktop or an application in other browsers (except Safari) if you do not need the extra functionality provided by Chrome.

4. Open the program you want to share.

5. In Collaborate, click on the **Share Content** tab on the **Collaborate** panel and choose **Share Application/Screen**.

6. When viewing in the Google Chrome browser you will see three sharing options:
   a. **Your Entire Screen**: this option shares your entire desktop. If you have more than one screen then you can choose which one to share. Participants will see everything that appears on your desktop. Use Chrome if you need to share audio when sharing the desktop.
   b. **Application Window**: use this option to share a single application. You must have the program already open on your computer before you start application sharing. Participants will only see what happens in the chosen application and will not see anything else that you do on the desktop or in other applications.
   c. **Chrome Tab**: as the name suggests, the option to share a Chrome tab is only available in Chrome. This allows you to share another tab that you have open in Chrome. Participants will only see the contents of that tab and not any other if you switch to a different tab. This tab also allows you to share audio so that you can play a video from YouTube or Media Hopper.
7. When using Chrome, select the desktop or the application to share and click on **Share**. Other browsers work slightly differently:
   a. Firefox presents you with a dropdown list from which you can choose any open application or your screen. Select the one required and click on **Allow**.

   ![Firefox Screen Sharing](image)

   b. The original Microsoft Edge browser is no longer supported by Blackboard. The view, and functionality, in Edge (Chromium) is very similar to that in Chrome. The main difference is that the Chrome Tab is renamed to Microsoft Edge Tab.

   ![Edge Screen Sharing](image)

8. To stop application sharing, click on the **Stop Sharing** button on the **Share Content** tab.

   ![Stop Sharing Button](image)
**Tip:** If you want to share an application’s audio (for example a video) you should use Chrome or Microsoft Edge (Chromium) and make sure you tick the Share Audio box in the Share your screen window.

**Share Camera**

The Share camera option allows you to share more than one camera. You can share video using the Share Video button (lower middle toolbar) and share another camera connected to your computer. This allows attendees to see you and anything else you want to show.

9. To share a second camera, click on Share Camera on the Share Content tab.
10. Check the preview and click Share Camera when you are ready to share.
11. When you want to stop sharing the camera, click on the Stop Sharing button above and to the right of the content.
Share Files

The following files can be loaded into the Whiteboard:

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

Each slide becomes a separate Whiteboard page which is displayed as a static image in the background. Any animations or embedded links to video or the web 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.

12. To load a presentation, click the Share Content button and choose Share Files.
13. Click on Add Files or drag a file into the box to upload it.
14. Click Share Now, then select a slide for participants to see it.
15. 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.

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

Uploaded files remain in the session until removed by a moderator or presenter.
Polling

Polling allows participants to respond to a question. There are two question types to choose from – **Multiple Choice** or **Yes/No Choices**. Yes/No comes with fixed options whereas Multiple Choice comes with two (can be increased up to five) editable options. Polls cannot be set-up in Collaborate in advance so you may want to have the question saved in Word so that it can be copied into Collaborate.

You do not have to edit the question or the answers when setting up polling – you could leave the default options and speak the question, or have the question on a slide.

To share a poll:

17. Click the **Share Content** tab in the **Collaborate** panel and choose **Polling**.
18. Select the question type you wish to use.
19. Edit your question. You can choose to fill in the **Ask a question** text area with the question to be asked. If you have chosen a Multiple Choice question, click **Add choice** to add the required number of choices and optionally type in the **answer choice** options.
20. Once you have finished creating the poll question click on **Start**.

The poll pops up for all participants. You and your students can select an answer to the poll.
Moderators see the total responses in the pop-up window, along with the number of participants still to respond. They can also see the response made by each participant on the Attendees list during the poll.

21. Click **Show Responses** to make the total responses visible to the participants. This also locks the poll so that no-one can change their response or add a response.

22. Click **Hide Responses** to hide the responses from the participants and unlock the poll.

23. When you have finished polling, click on the **End the Poll** button (black square in a white circle) to close the poll. Note that the data from polling is lost once the polling window is closed.

**Tip:** You can start a poll while sharing other content:
- When sharing a whiteboard, your screen, an application or camera, just click on the **Polling** option and set up as described in this section.
- When sharing a Chrome/Edge tab, you will have to switch your view back to the tab holding the Collaborate session to start and run the poll.
- When sharing files, use the back arrow at the top of the slide drawer to get back to the top level of the Share Content area to start and run 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 attendees to switch groups” option. Breakout groups are not recorded.

24. 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. There must be at least 4 people in the Collaborate session for the random assign option to be available.

Tip: If you select Custom assignment in the Assign Groups menu you get to choose who goes in which group.
25. To move yourself to a breakout group, click the **Share content** button, then **Breakout Groups**. Find your name in the **Main Room**, click on the three dots and select which group you’d like to join. Click the **Update** button.

26. 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 icon to the right of their name, choose the group you want to move them to and click **Update**.

27. To close the breakout groups, go to the **Share content** tab. Click the **End Breakout Groups** button.

**Tip:** You can also move yourself and participants between breakout groups and close the breakout groups from the **Attendees** tab.
## Moderator Tasks Check-list

### Permissions
- With their permission, change the role of another attendee in the session. Make sure you set their original role back afterwards
- Change tool permissions for all participants
- Find where to remove a participant from the session (but don’t do it)

### Recording
- Start and stop the recording

### Whiteboard
- Open the whiteboard
- Draw on the whiteboard

### Share Application
- Share a Chrome tab (for example https://media.ed.ac.uk/)
- Stop sharing

### Share Files
- Load content into share files (this could be an image, PowerPoint or PDF file)
- Share the content
- Stop sharing

### 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
- End breakout groups
Further Resources

Blackboard Collaborate Ultra Support Portal:
https://help.blackboard.com/Collaborate/Ultra
Session Best Practices:
https://help.blackboard.com/Collaborate/Ultra/Moderator/Moderate_Sessions/Session_Best_Practices

Information Services’ Collaborate webpages:
https://www.ed.ac.uk/is/collaborate
These pages include:
- Guides for setting up Collaborate sessions in MyEd, Learn and Moodle
- Session preparation advice and checklist
- Information about how to access Collaborate using a mobile device
- Suggestions for troubleshooting audio and video issues in Collaborate
- Tips on how to keep Collaborate sessions secure
- Information on what is included in Collaborate recordings and how to download and store recordings

Microsoft Edge (Chromium) download page:
https://www.microsoft.com/en-us/edge

Information Services (IS) Helpline
If you need any other help with Collaborate please contact the IS Helpline:
https://www.ed.ac.uk/is/helpline