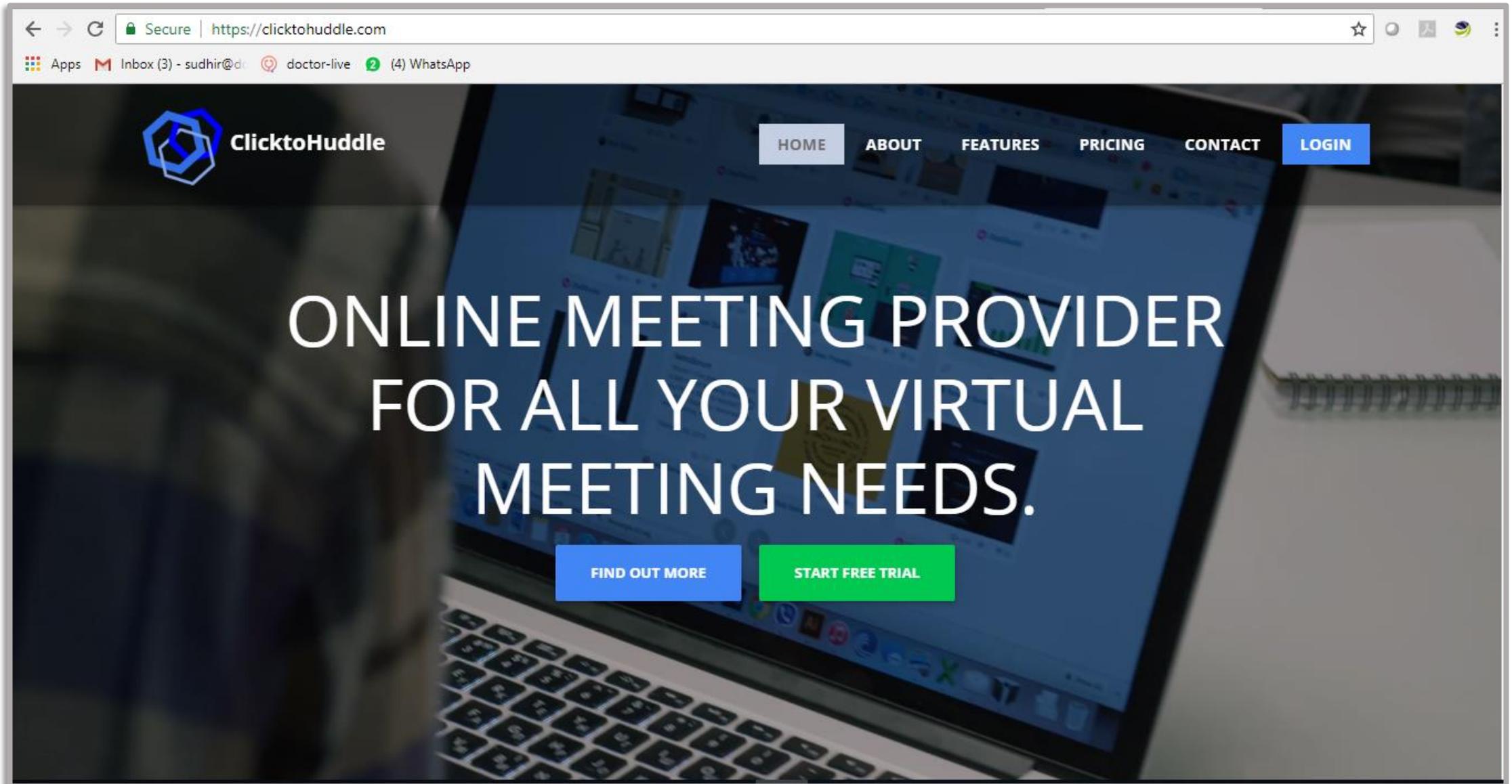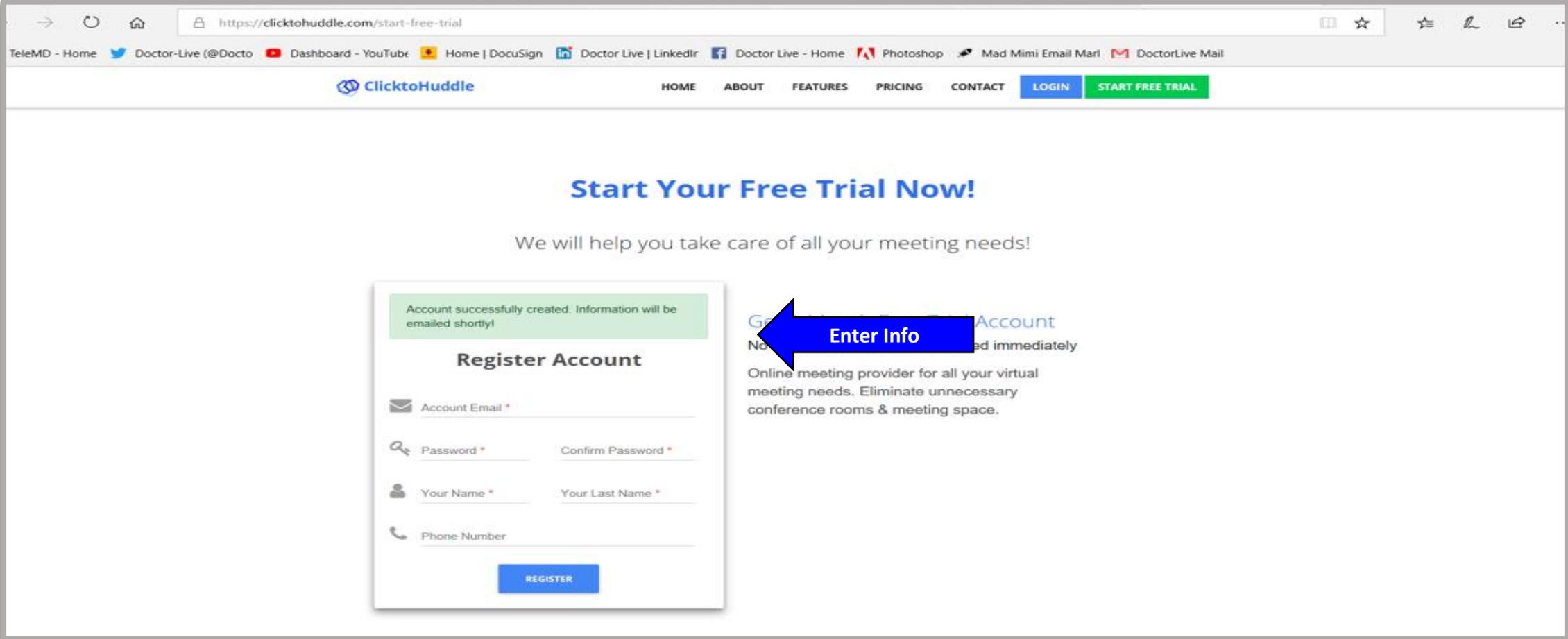# ClicktoHuddle Training

Visit www.clicktohuddle.com and familiarize with the portal
1. Click on Start Free Trial to register for the service
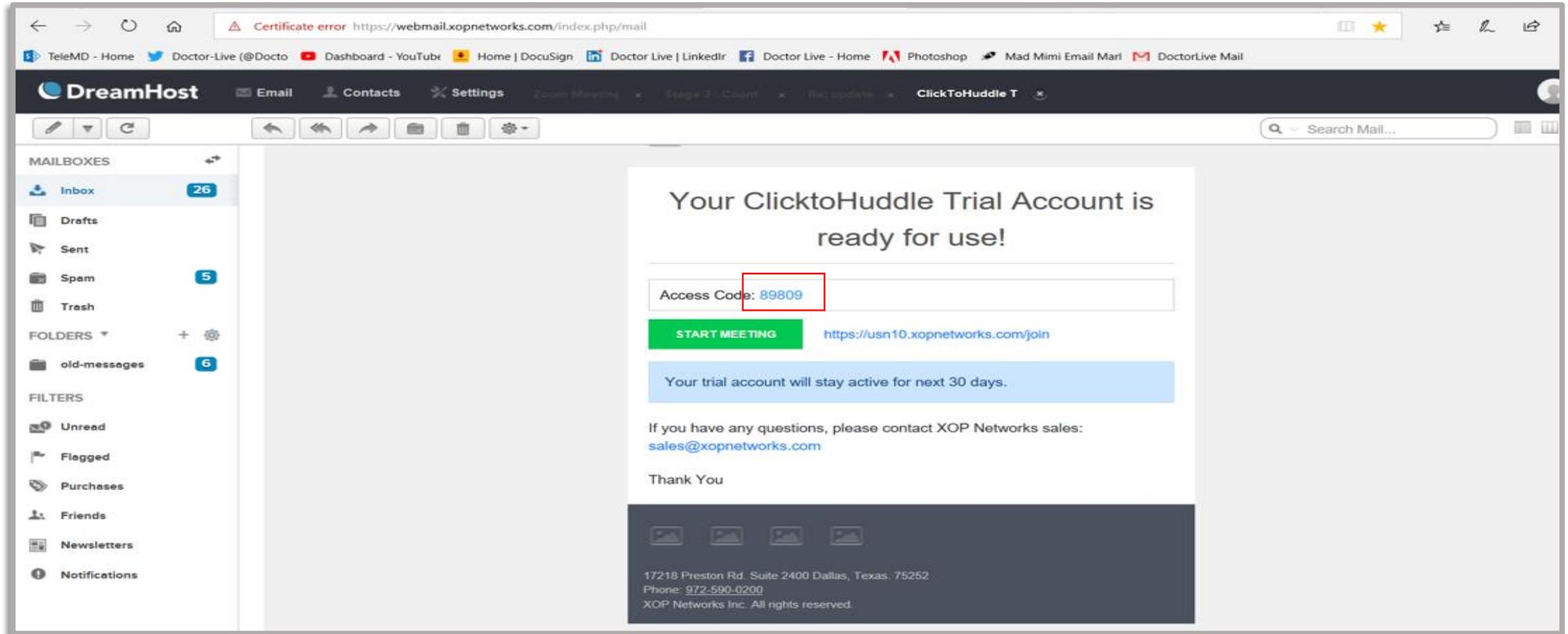
Register for your Free Trial

Register your Account
1. Fill out the information requested

Welcome Email

Once the account is ready a welcome email will be sent to your email address
1. Make a note of the Access Code provided in the email
2. Click on Start Meeting

Test Your Audio & Video Before You Enter Your Huddle Room

Test Your Equipment
1) Click the link to test your equipment
2) Allow access to your PC's microphone and webcam to your browser
3) Rescan equipment if you need to
4) Click apply

ClicktoHuddle Confidential

Entering Your Huddle Room

Click to Huddle

Join Web Conference

Your Name | Angie Bryant
Access Code | ••••

Join ← Enter Info
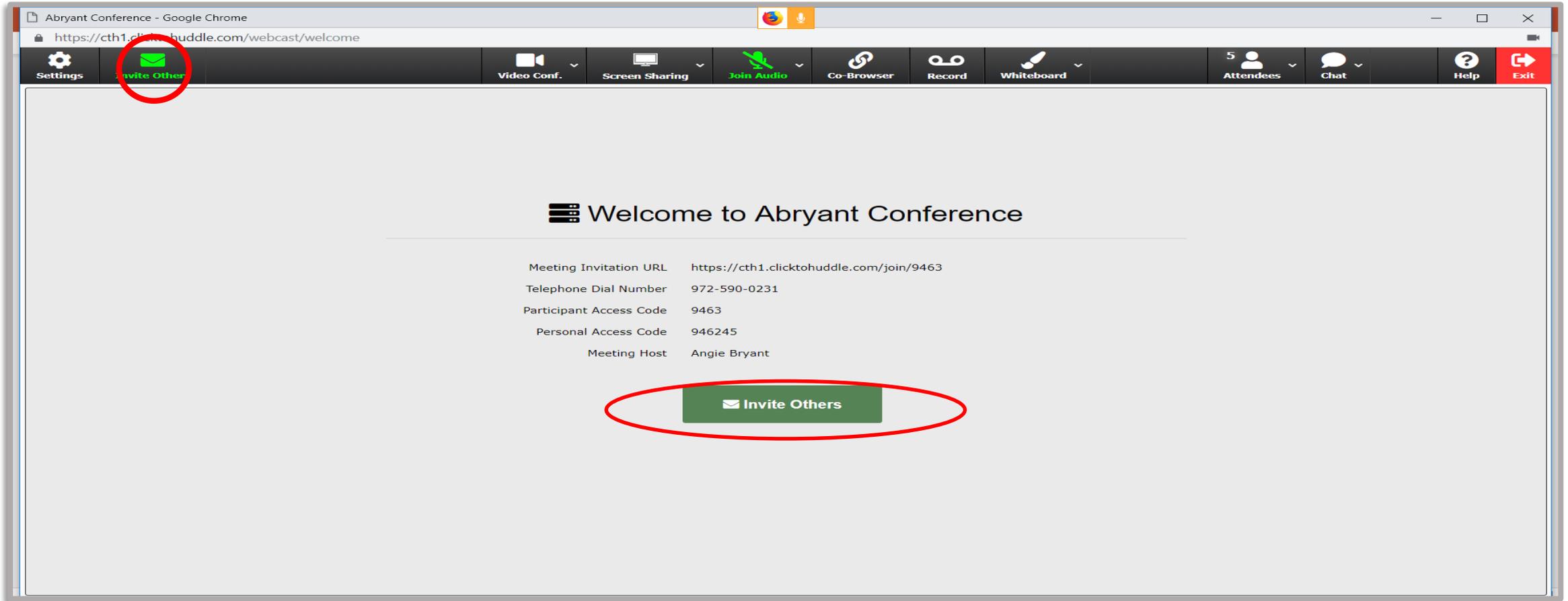
To test your audio and video, click here
Your session has ended. Please sign in again.

You can now enter the Huddle room
1) Enter your Name
2) Enter the assigned Access Code

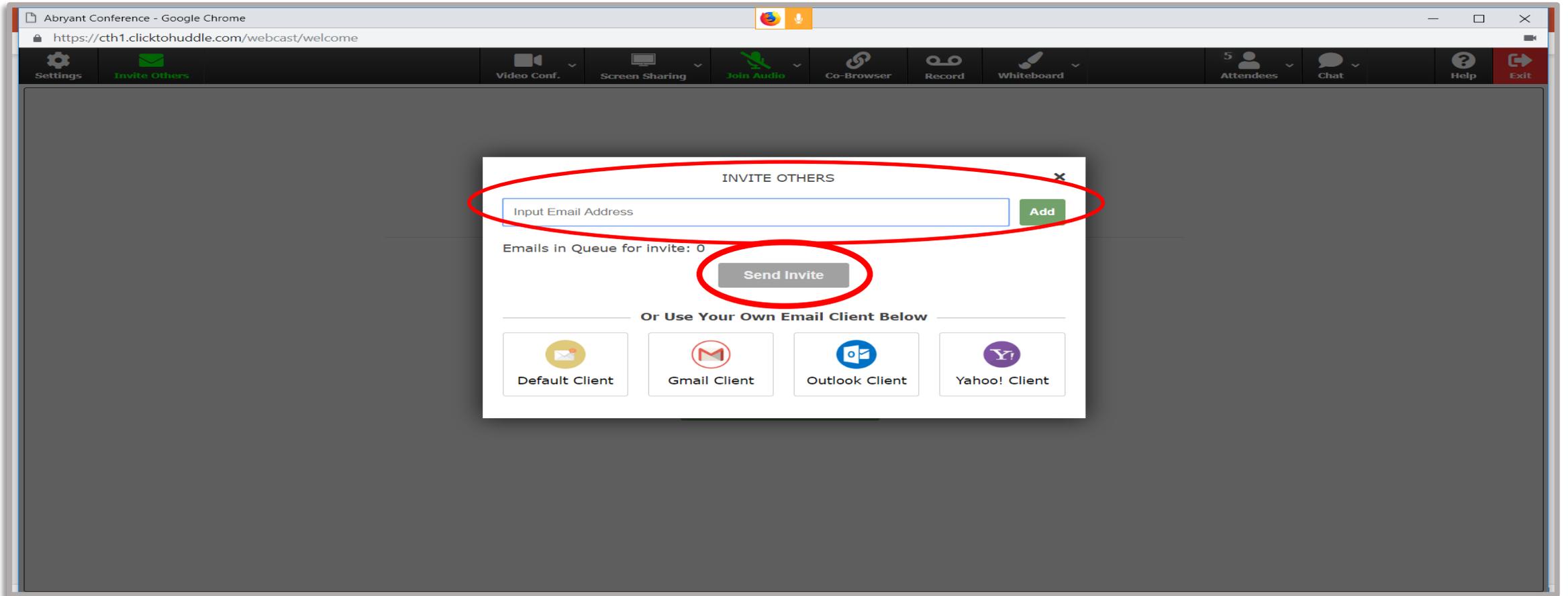# Start Your Huddle

Welcome to your Conference!

1) Click on Invite Others to send email invitations to fellow attendees.

ClicktoHuddle Confidential

Inviting Others

After you clicked on Invite Others
1) Enter your attendees email addresses to invite them directly from the conference
2) Click Add after each email entry
3) Click send invite and they will be invited via email with a direct link to join your conference.
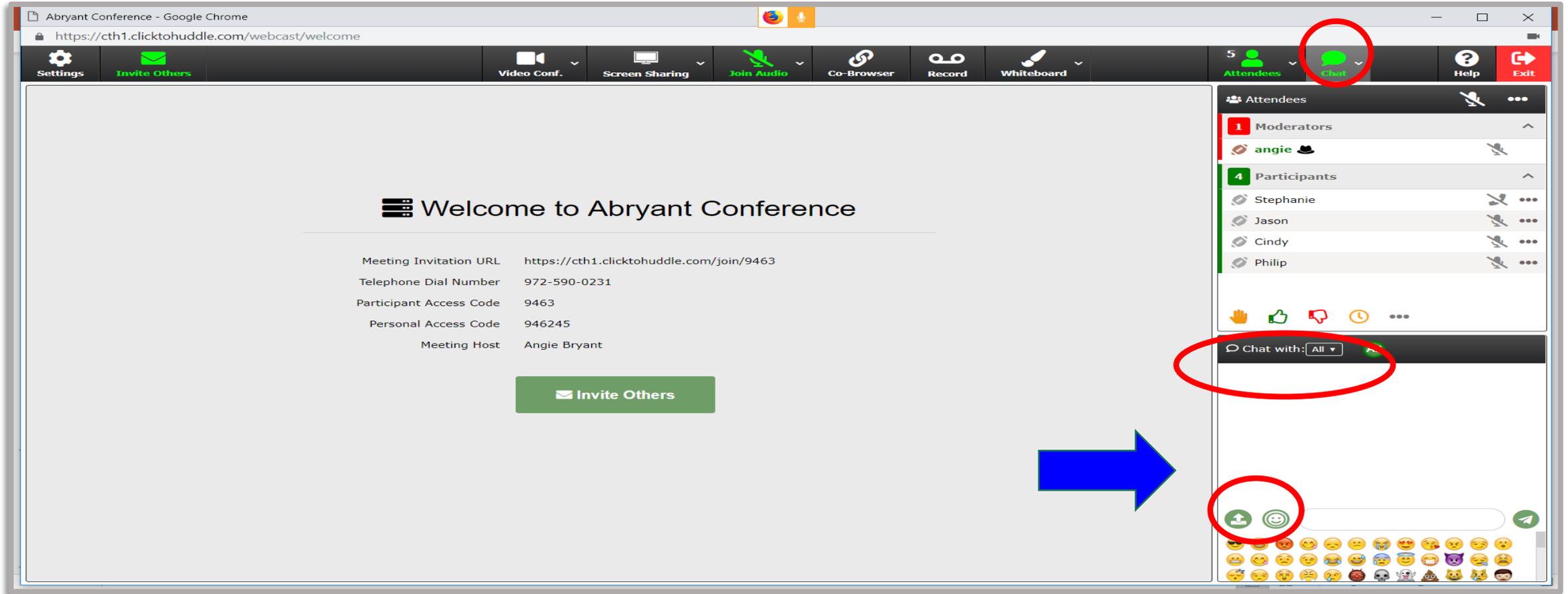
View Attendees

To view attendees in the conference click on the Attendees icon
- Attendee panel will be displayed as shown
    - Moderator is shown in the top section under moderators with a black hat indicating moderator
    - Attendee with the brown football is currently the Presenter in the conference
- The Moderator can pass the football to who ever wants to share their screen and can take back possession of the conference at any time

Chat Function

To chat with attendees in the conference click on the chat icon & it will populate on the far right
- You can chat with all attendees
- You can also have a private chat with a specific attendee
- Attendees can upload and download documents via the chat panel.
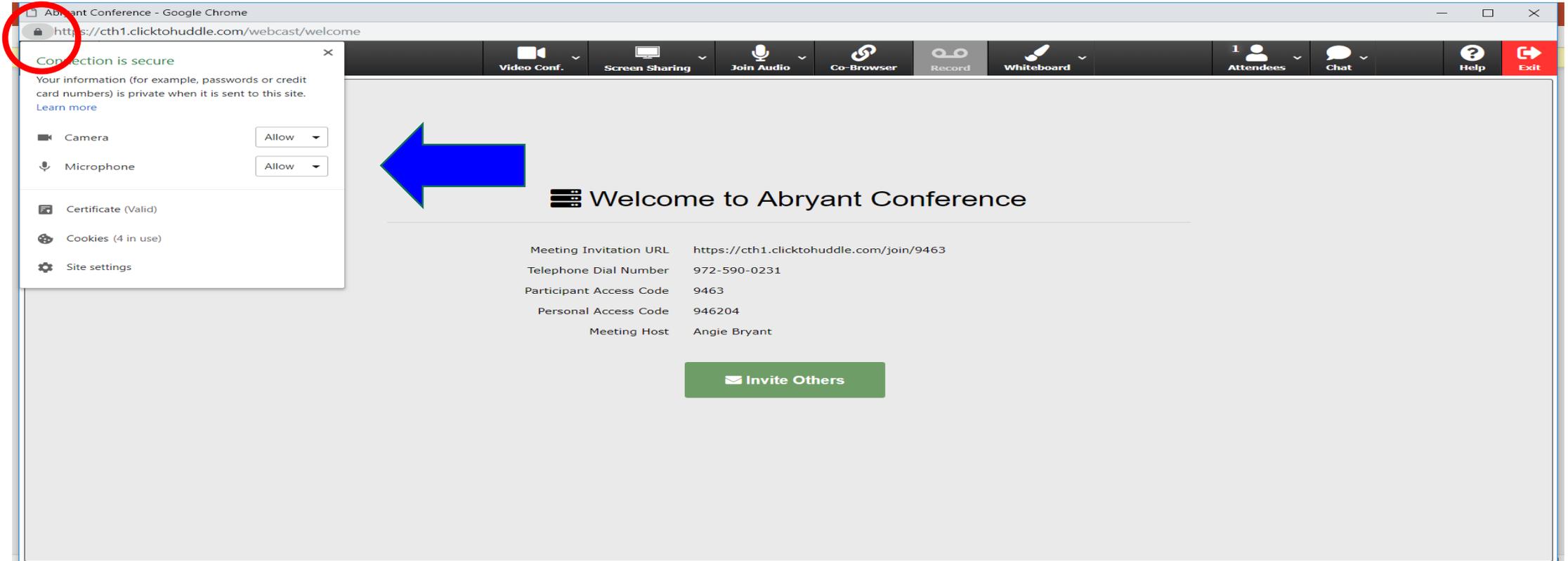- Attendees can use emojis to express their emotions via chat

Interactive Feedback Functions

Attendees can interact with many emotes – raise hand for a question, vote on a topic or make a quick comment
- Click on the attendee panel
- Click on relevant emote
- Additional emotes can be found by clicking on the three dots

Ensure Your Audio & Video Settings Are Enabled

Before you start sharing Audio or Video capabilities, make sure your browser can access your PC's microphone and webcam
1) Click on the lock icon on the left side of the URL (as seen on Chrome browser)
2) Ensure that Camera & Microphone are enabled

Start Screenshare
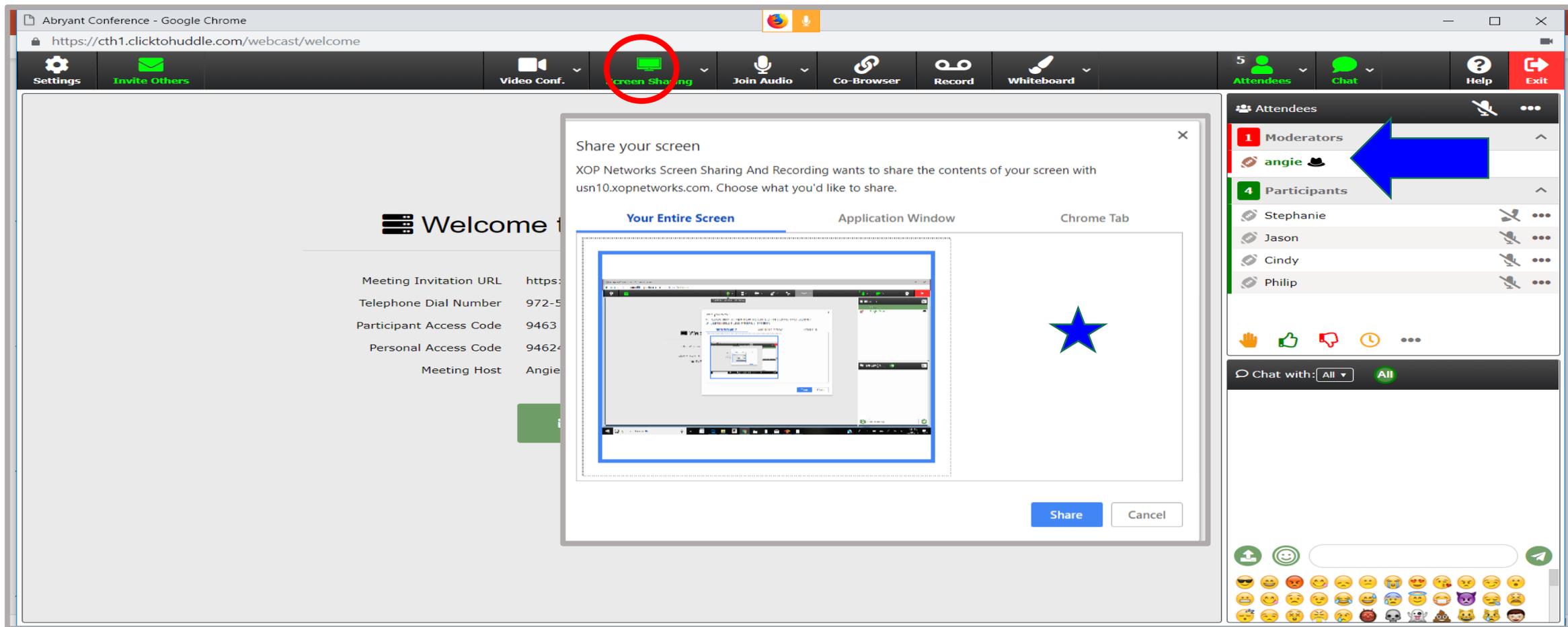
To start screenshare click the screen share icon, only the person in possession of the ball can share their screen
- You will receive a pop up letting you choose to share your entire screen, specific application or a browser tab

In order to share your screen, you will need to add the XOP Chrome extension, see next page for directions

Adding Chrome Extension for Screensharing

To add the XOP Chrome extension, click on the link to the web store
- In the web store, add the extension
- After you install the Chrome extension, you will receive a pop up letting you choose to share your entire screen, specific application or a browser tab

Joining the Audio Conference

You can join the Audio Conference in two ways
1) Click on the Microphone icon to make a VoIP call. This option should be used preferably with a headset.
2) Dial the PSTN number displayed and enter the Personal access code
    a)   As a Moderator you can Mute All attendees or Mute individual attendees
    b)   Hold, Remove or Change Name of an Attendee

Start Video Conference

To start your video conference click on the camera icon
- Ensure your camera access in enabled
- Your video will be displayed on your screen. Other attendees will see your video in the video headshots displayed on top

Typical huddle Session – Audio/Video Conference with Screensharing

- Click on the View Media icon to restore your view of an ongoing session

Recording a Huddle Session
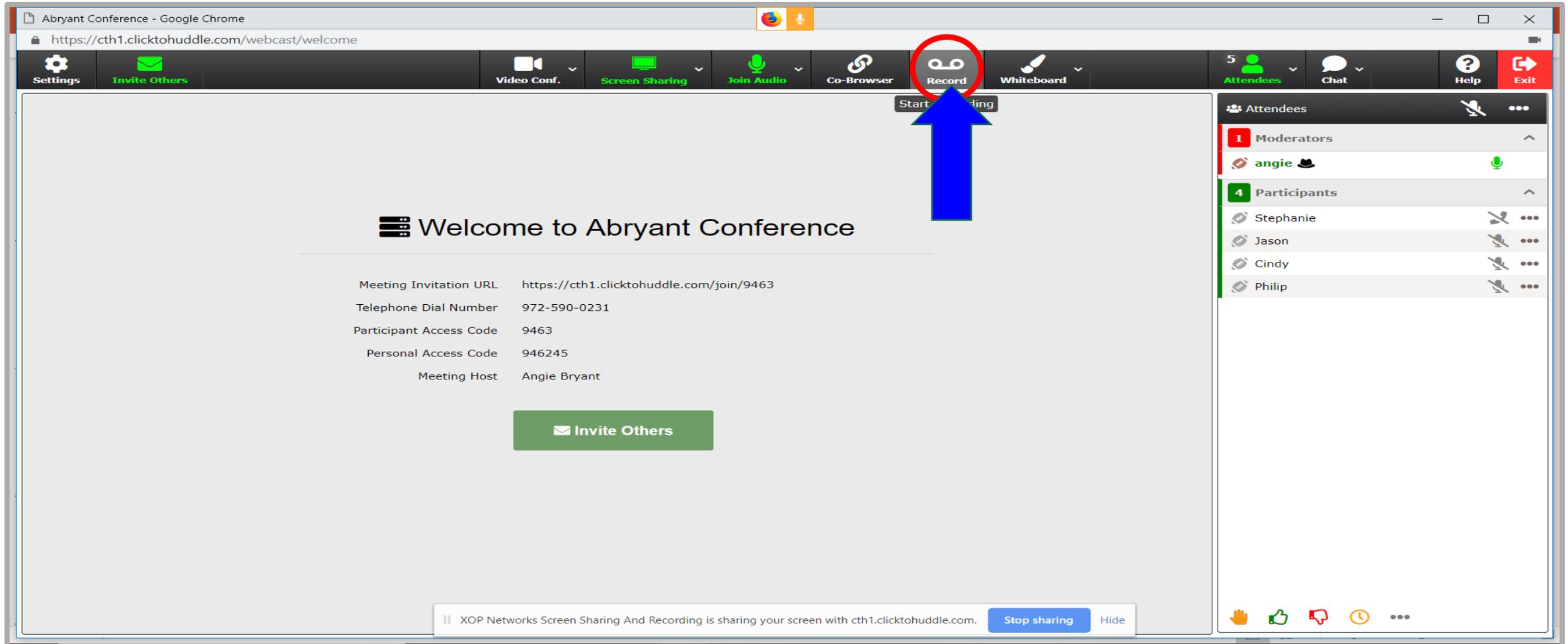
To begin recording, select the recording icon
- Only a Moderator can record a session
- Recording can only be initiated if an audio or video conference is in progress
- Participants see their recording icon turn Red if recording is in progress

Invite Attendees from Conference
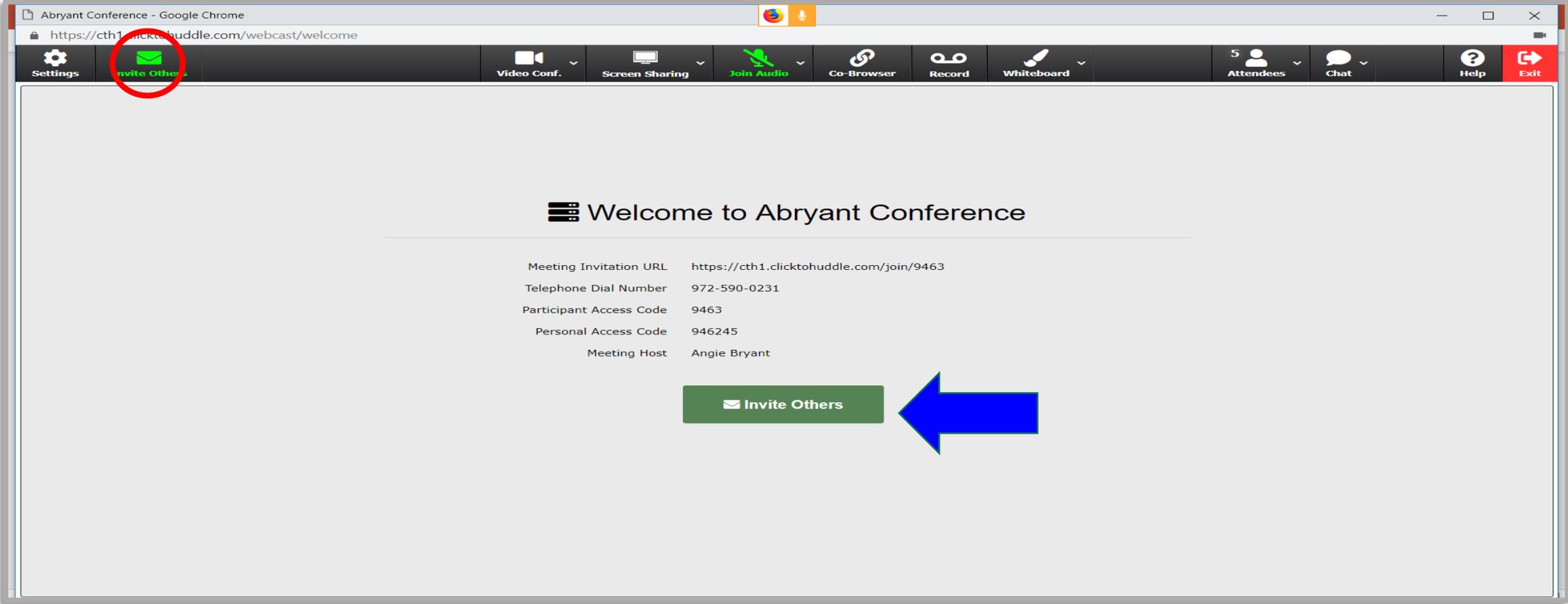
You can easily invite additional attendees when you are in a conference
- Click on the mail icon to invite attendees or click on Invite others from the main page

System and Feature Settings

To view/modify settings, click on the settings icon
- You can also modify feature settings for individual features by clicking on the associated down arrow
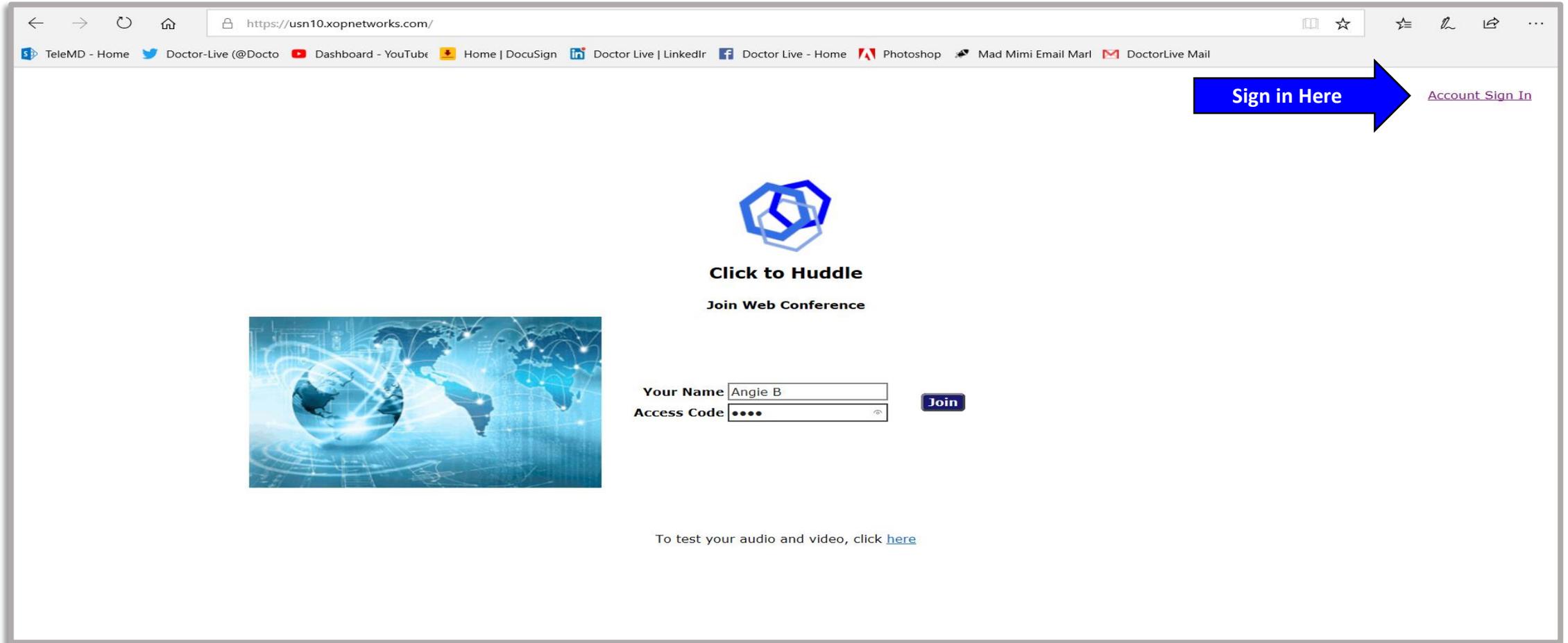
End or Leave Meeting

You can end or leave your meeting pressing the red icon
- A pop up will ask you to confirm whether you are leaving or ending the meeting

Using Your Recordings

Your recordings are saved in your Moderator account on the system.

1. Log into your Account by clicking on the Account Sign In ink (top right hand corner)
2. Enter your email id and the password you chose when you signed up for the free trial account
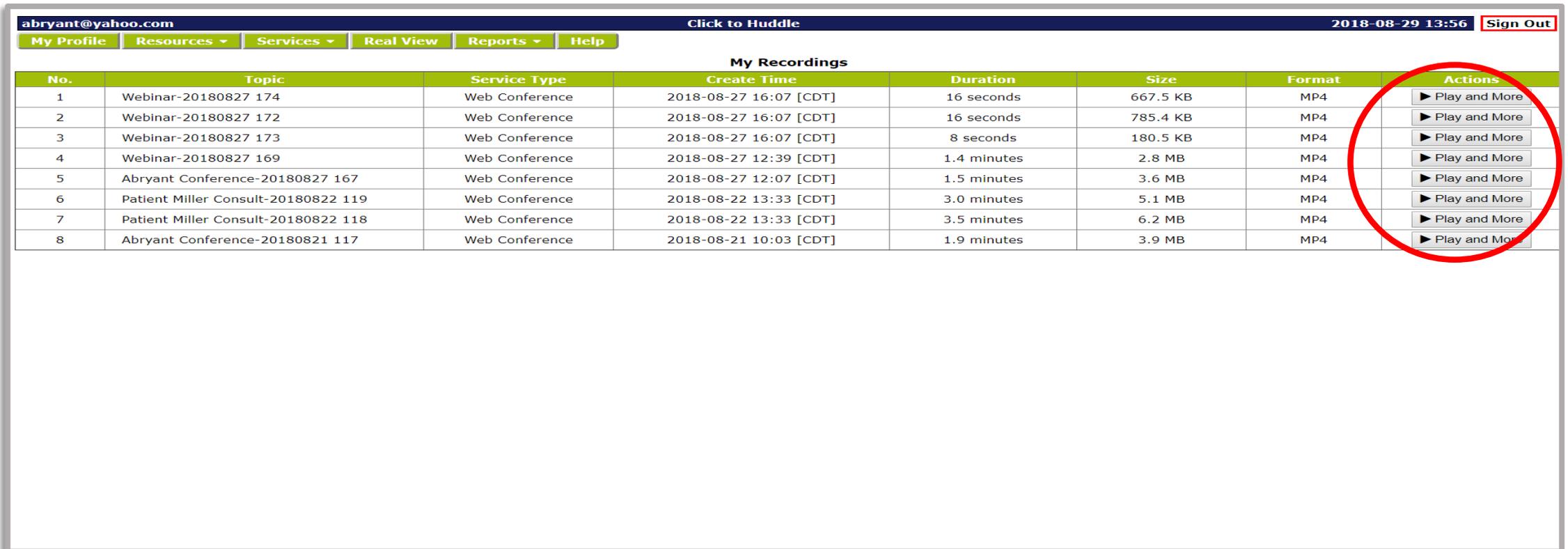
Your Account Settings

After logging into your Moderator account, familiarize yourself with various settings
- Easily invite attendees and initiate huddle by clicking on 'Meet'
- You can view logs and recordings associated with your account usage
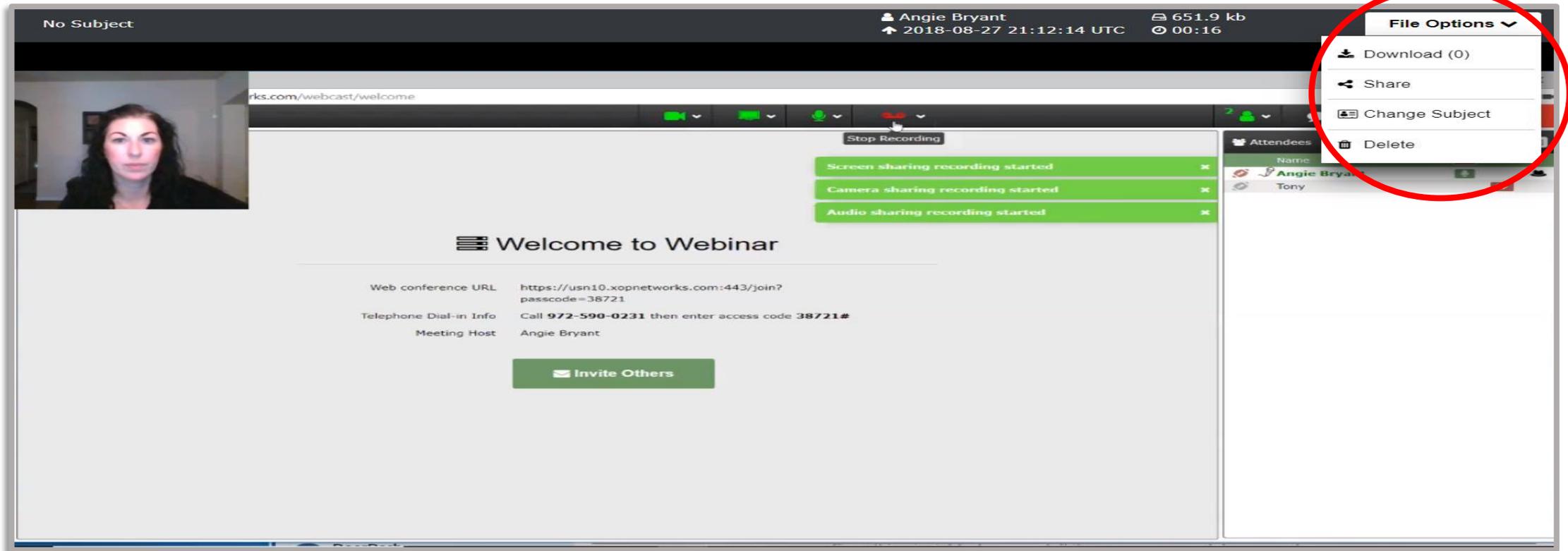
Playback Recordings

Recordings are stored on the system as MP4 files

- Select the recording you would like to play
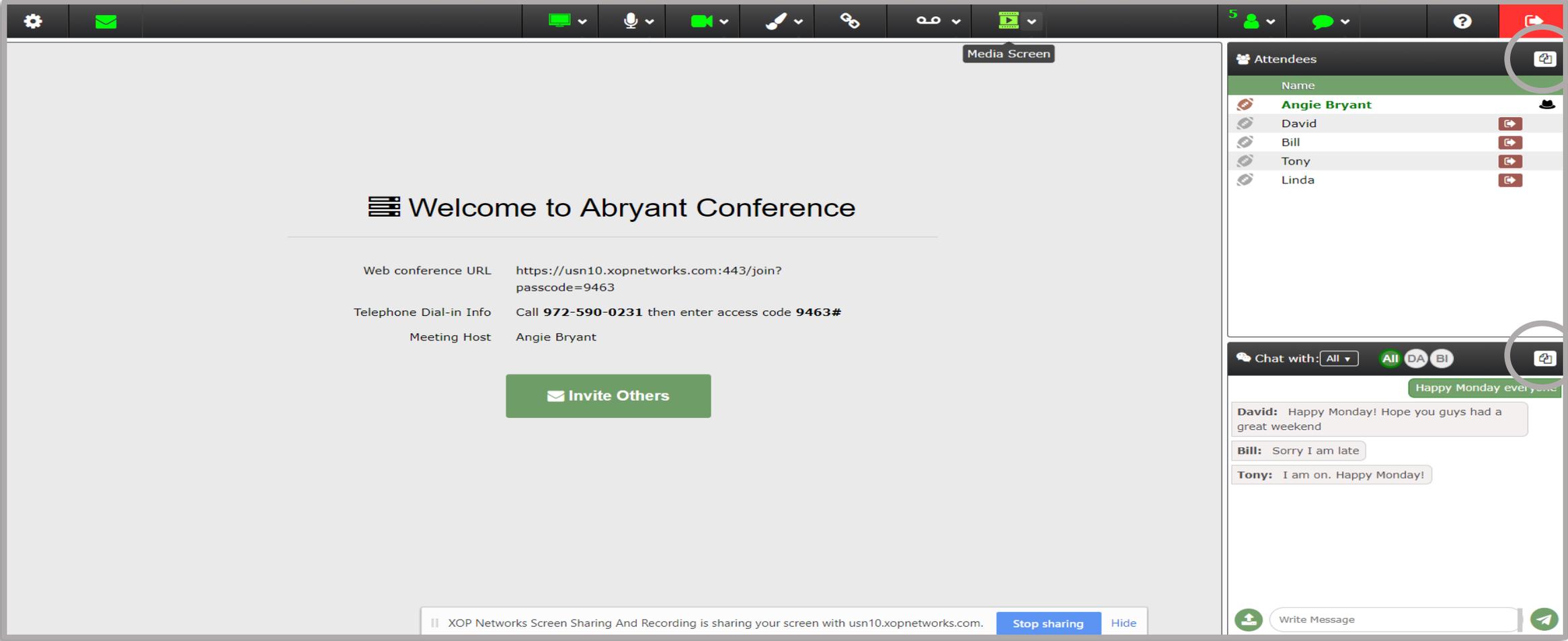
Play Recordings

Once you select the recording you would like to play
- You can download the recording
- Share the recording link
- Delete recording, please note: this is the only way you can delete your recordings from your account.
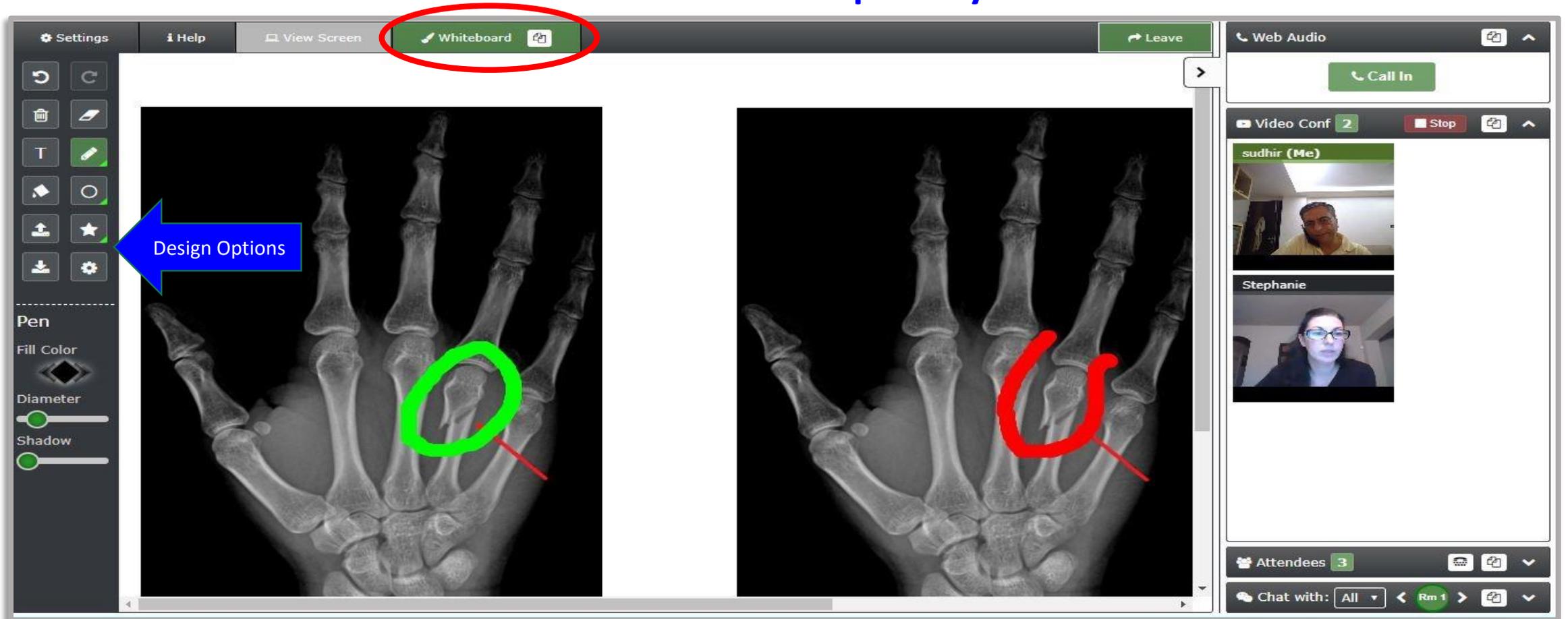
Additional Features

Detach Windows Capability

You can detach the video, attendees & chat panel to move to a second monitor
- Click on the detach icon on the specific window
- Make sure the 'Detachable Windows' setting is enabled on the Settings panel

White Board Capability

You can use the Whiteboard for multiple collaboration sessions such as telemedicine consults, graphic design or logo creation:

- Multiple attendees can collaborate on the Whiteboard at the same time
- An image can be uploaded, annotated with text, graphic mark up & ability to save the final image
- Any attendee can collaborate during the session without being a moderator

Co-browsing Capability

Co-browsing capability allows a Moderator to share a website with fellow attendees
- Type the web site address to share with attendees
- Attendees will be alerted indicating that a moderator is wanting to share a website

Removing System Messages from Chat

You can remove system messages & only see chat conversations instead of when people enter and exit
- Click on settings
- Turn off system messages in Chat Settings