

UVC Initial Setup Guide

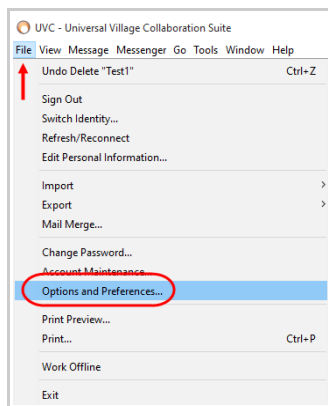
In this initial setup guide we will explain how to:

- I Setup your calendar Default Time Zone
- II Setup your Detail Pane Location
- III Setup your UVC Skin (the visual look of UVC)
- IV Setup your Window Layout
- V Add a contact to your Messenger buddy list
- VI Share an e-mail folder with a UVC user on your buddy list
- VII Share your calendar with a UVC user on your buddy list
- VIII Create a text e-mail signature.

I. SET UP YOUR CALENDAR DEFAULT TIME ZONE

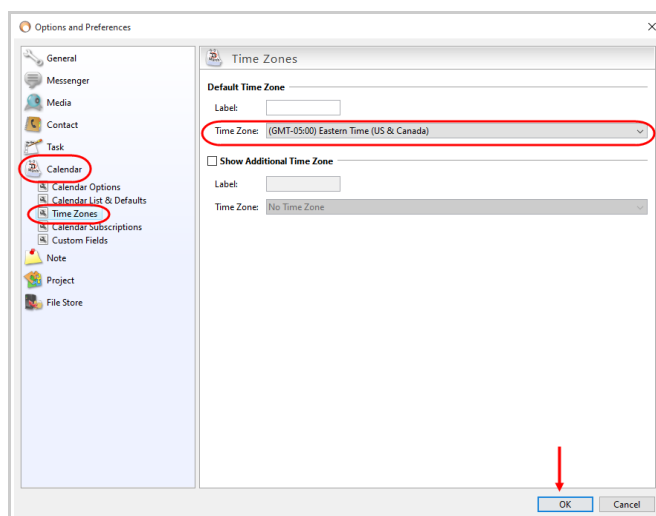
When you initially log in to UVC we recommend that you configure your calendar **Default Time Zone** as this will dictate the default time that will be indicated when creating tasks, appointments and/or meetings within UVC.

Click on **File** and then **Options and Preferences**:



Then click on **Calendar** and then **Time Zones**.

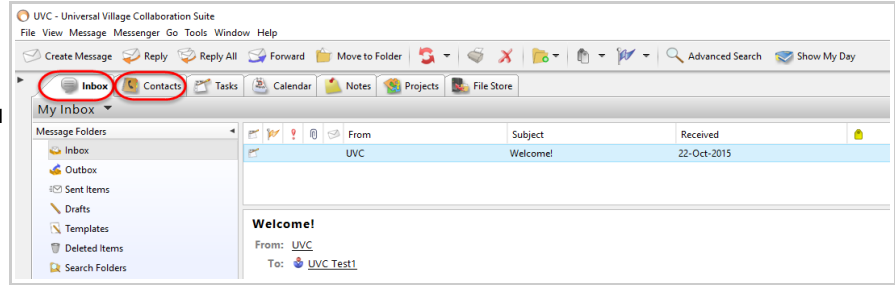
On the right side of the screen you will be able to choose your **Default Time Zone** from the available drop down menu. Once you have made your selection, click on the **OK** button to save your choice. Future tasks and appointments you will create in your calendar will have a time stamp of your selected time zone.



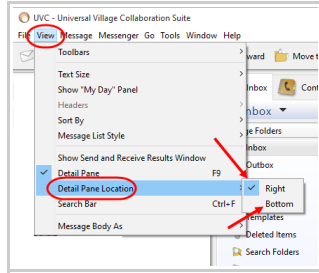
II. SETUP YOUR DETAIL PANE LOCATION

Your next step is to decide where you want your Inbox and Contacts **Detail Pane Location** to be located. You can choose between either the **RIGHT** side or the **BOTTOM** side for each window view.

First make sure you are looking at your **Inbox** **Module** view or your **Contacts Module** view. You can do so by clicking on the tabs located at the top of your UVC window screen.

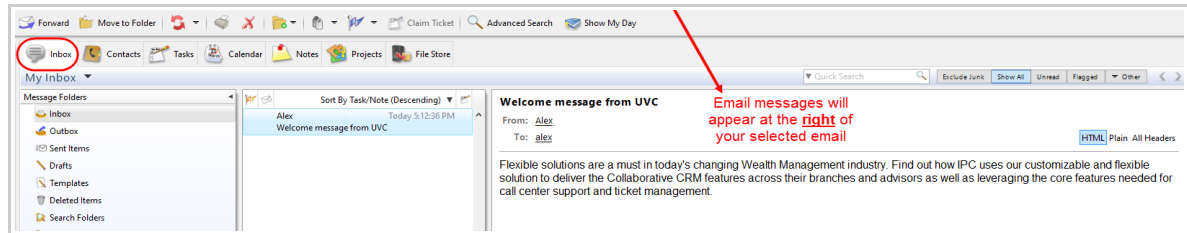


Once you have clicked on the desired module click on **View** and then **Detail Pane Location**.

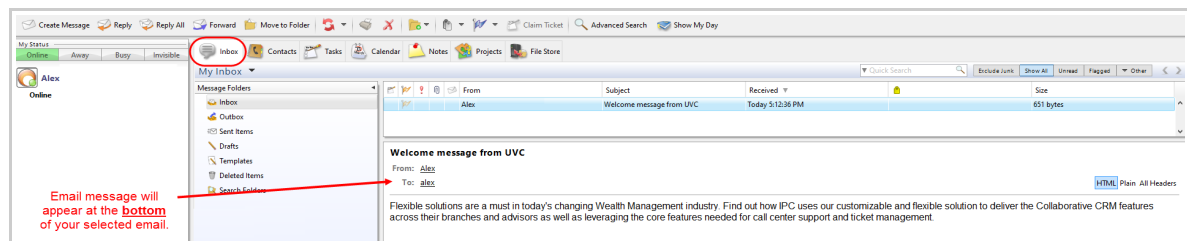


By default the **Detail Pane Location** will be set to the **RIGHT** (a check mark will be placed next to the current view that is selected). Select the one that better suits your needs when working with UVC.

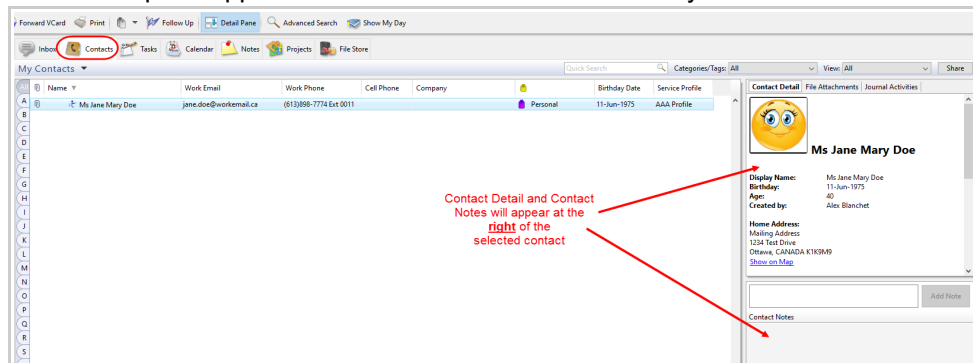
You can select either the **RIGHT** side:



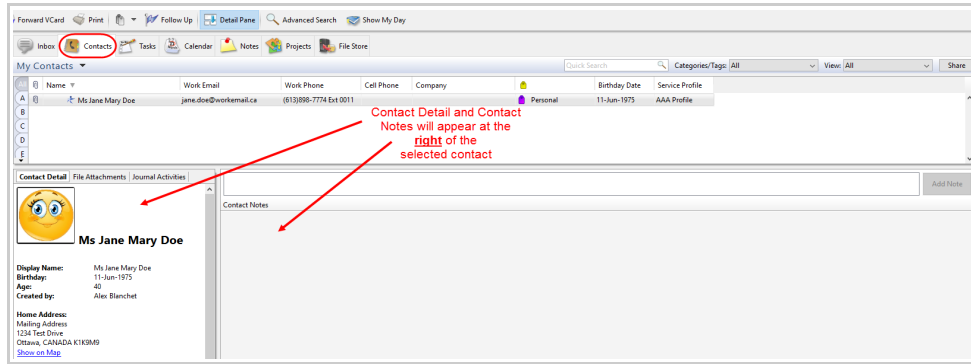
Or you can select the **BOTTOM** option:



The same option applies to the **Contacts Module** view. If you select the **RIGHT** side it will show below.

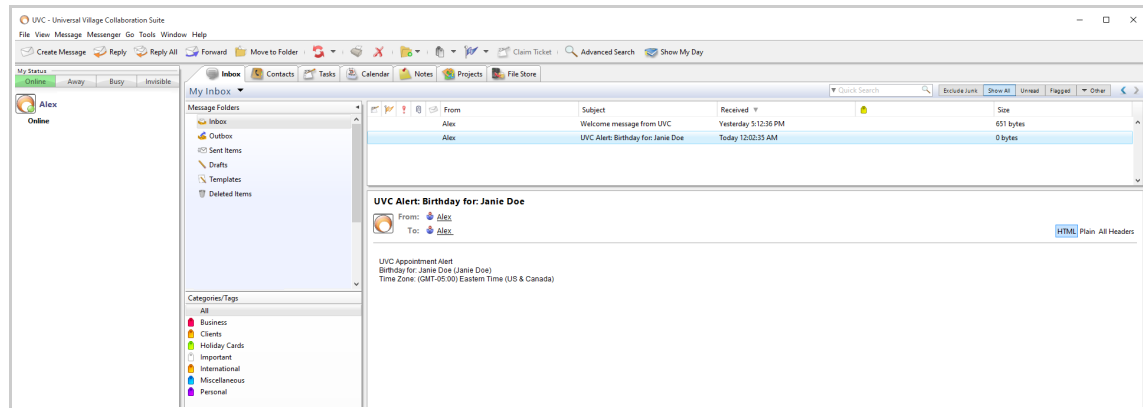


If you select the **BOTTOM** view the Contact Detail and Contact Notes will be shown below your selected contact name. It's really a matter of preference.

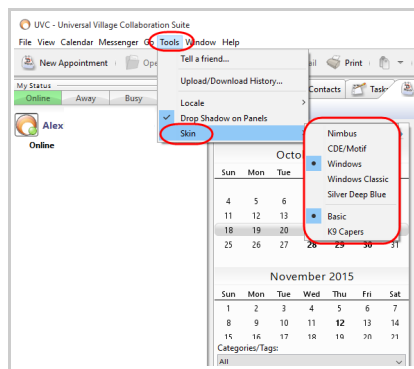


III. SETUP YOUR UVC SKIN (THE VISUAL LOOK OF UVC)

There are various choices you can apply to change the look of UVC. Again these options are a matter of preference. By default the “skin” applied to the UVC application will be **Windows Basic**.

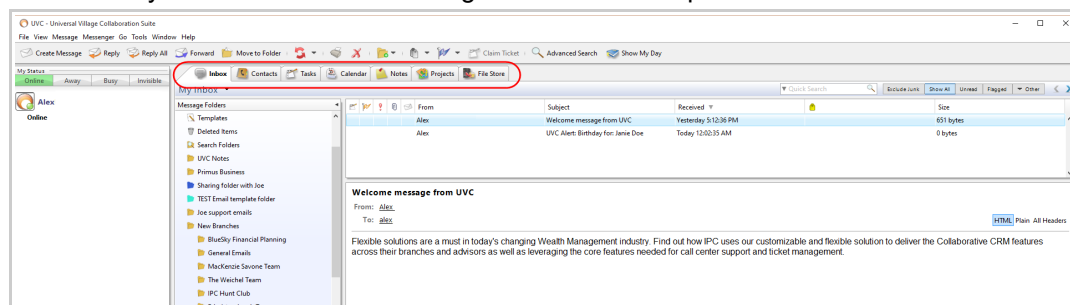


Your visual **Skin** choices are located under **Tools** and **Skin**.

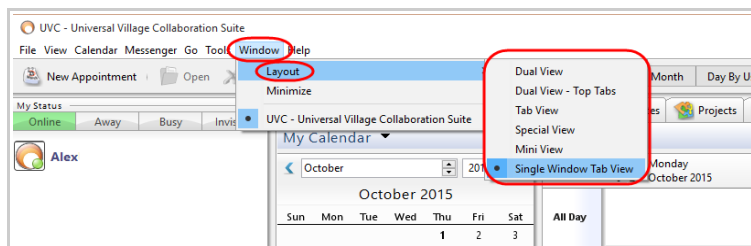


IV. SETUP YOUR WINDOW UVC WINDOW LAYOUT

Your next step is to select the **Window Layout**. This option will change the appearance of the UVC application. By default the **Window Layout** will be set to **Single Window Tab View**. This view will automatically create a new tab to the right of the last tab opened.



Your visual **Window Layout** choices are located under **Window** and **Layout**.

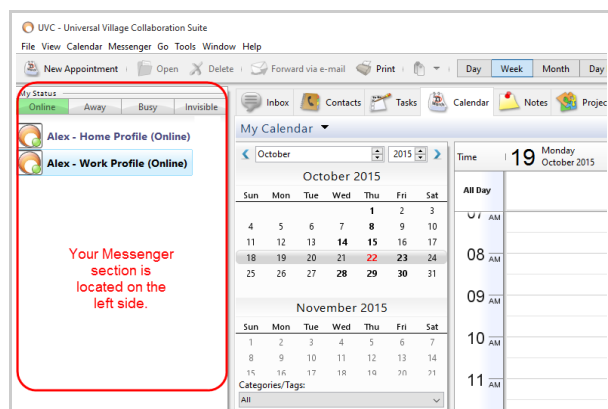


The preferred choice for **Window Layout** is the **Dual View – Top Tabs** because it creates a new window when creating or editing contacts, notes, emails etc... when you double click on them. The **Dual View – Top Tabs** option mimics the Microsoft Windows and Apple iOS operating systems which are most commonly used. If you have dual monitors or a very large screen possibly the **Mini View** could be a good choice. This allows you to open each module as a separate window. You could add the windows most commonly used on each of your dual monitors or split them in half on your large screen. Again this is a matter of preference and how you want to personalize your own UVC application.

V. ADD A CONTACT TO YOUR MESSENGER BUDDY LIST

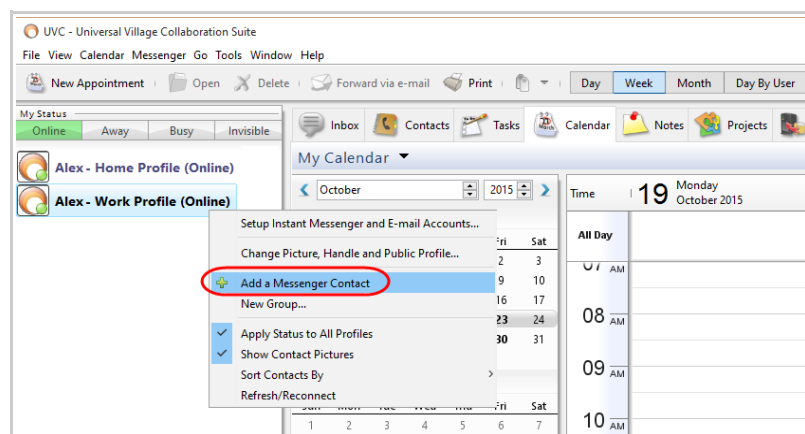
Once you have set up your calendar **Default Time Zone** and selected your preference in the appearance of your UVC application your next step is to add a UVC contact to your **Messenger buddy list**.

The Messenger section is located on the left side on the UVC application window. Please take note that the contact you want to add to your **Messenger buddy list** has to have their own UVC application installed on their workstation or home computer.



You will see a *Home Profile* (personal/family contacts list) and a *Work Profile* (work contact list). In the example below we will add a new contact to the Work Profile. The same logic to “add” new contact also applies to the Home Profile.

To add a new contact to your **Messenger buddy list** simply right click on the Work Profile and select the option **Add a Messenger Contact**.



A pop up window will open up which will give you two options:

(1) Add your new contact to your Home Profile or Work profile. Since I already selected my Work Profile (from the step above) it will be defaulted to that specific profile list of contacts.

(2) Next you will need to choose which way you want to add this new contact to your list. The preferred way is using their UVC address. This option enables you to add them by handle name or by entering their email address .

Click on the **Next** button to get to next screen.

Add a New Contact for: AlexUVC - Work Profile

This wizard allows you to add a new online contact.
If you're not sure what your contact's UVC Address is, you may search for him/her by Name, Handle or E-mail if provided.

To which account or profile you want to add your contact to?

Profile: Alex Work Profile

How do you want to add a contact?

By UVC address

By searching the name, handle or e-mail address

Invite a friend... < Back Next > Finish Cancel

In my example I will add the new contact using the user's Messenger handle name which is AlexTest1. Once I have typed his handle name I will click on the **Next** button.

Add a New Contact for: AlexUVC - Work Profile

This wizard allows you to add a new online contact.
If you're not sure what your contact's UVC Address is, you may search for him/her by Name, Handle or E-mail if provided.

Contact Information

UVC Address: AlexTest1

Example:
johndoe
miked

Invite a friend... < Back Next > Finish Cancel

Then click on **Finish** button.

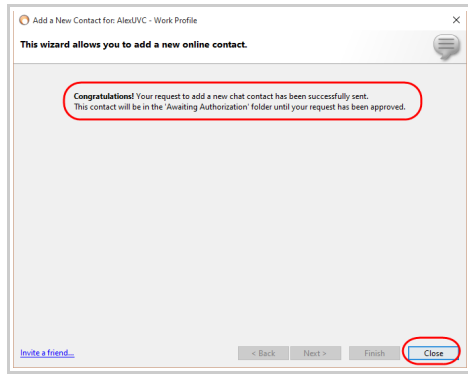
Add a New Contact for: AlexUVC - Work Profile

This wizard allows you to add a new online contact.
You can specify the level of permissions to give this contact.

You are now ready to add this contact. Click Finish to send request.

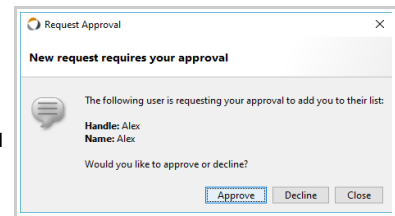
Invite a friend... < Back Next > Finish Cancel

You will see a pop-up window informing you that you have successfully added a new contact to your list.

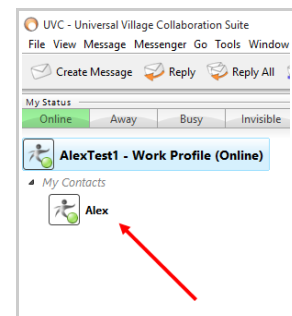


The new contact will not appear on your list until they (in this scenario AlexTest1) approve the invitation to be part of your contact list. Once you click on the **Close** button (see in the screenshot below) it will automatically send that new contact a **Request Approval** message so that they can be part of your contact list.

They need to click on the **Approve** button if they want to join your list and vice versa. This is important because this union will start the collaboration aspect of UVC between you and any other contacts you added to your instant messaging list.



The messenger contact you added will see your name appear on their messenger list and you will see their messenger name on your list.

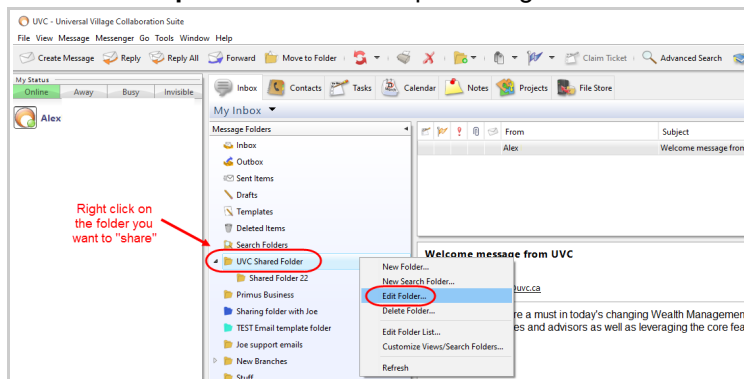


VI. SHARE AN E-MAIL FOLDER WITH A UVC USER ON YOUR BUDDY LIST

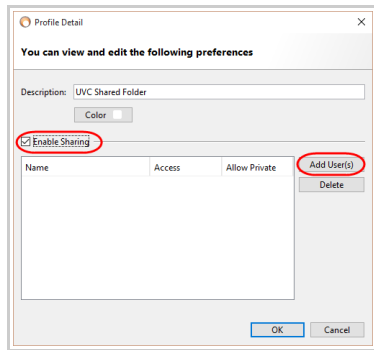
Now that you added a contact (see step#5) to your list it's time to enable the sharing feature in UVC with that new contact. In this sixth section, we will enable the sharing option on the **UVC Shared Folder** located under *Alex's* inbox and add the user *AlexTest1* so that he can have the ability to see, edit and move any emails within that shared folder from within his own UVC account. There are **four steps** to enable the sharing option on an email folder.

- (1) First right click on the email folder you want to share with this user.
Then click on **Edit Folder**.

Please take note that in the screenshot below under the **UVC Shared Folder** there's a sub folder named **Shared Folder 22**. If you also want a new or existing contact to have access to a sub folder then these **four steps** will need to be repeated again for that sub folder.



- (2) Your second step is to make sure to add a check mark to the option **Enable Sharing** and then click on the **Add User(s)** button.



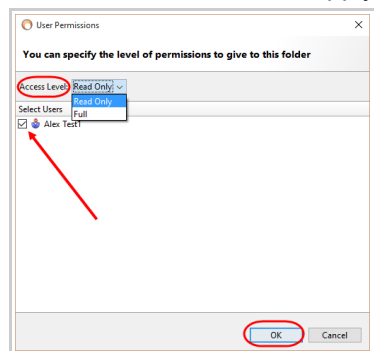
- (3) Your third step is to add a **check mark** next to the user that you want to share the email folder with and then select their **Access Level**.

Read Only access level will just give them a read only access. They will be able to read the emails and reply to them but nothing else.

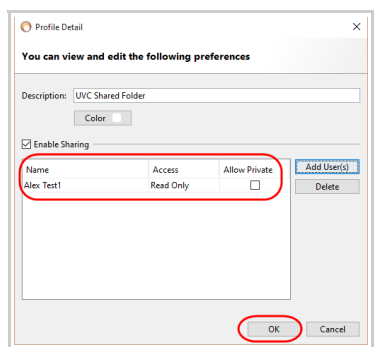
Full access level will give the contact the ability to read, modify (mark them read or unread for example) and move the emails from one folder to another.

Again this is a matter of preference but usually **Full** access is preferred.

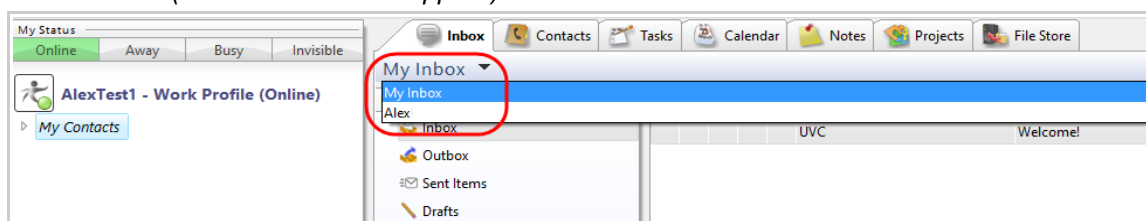
Click the **OK** button to apply your selection.



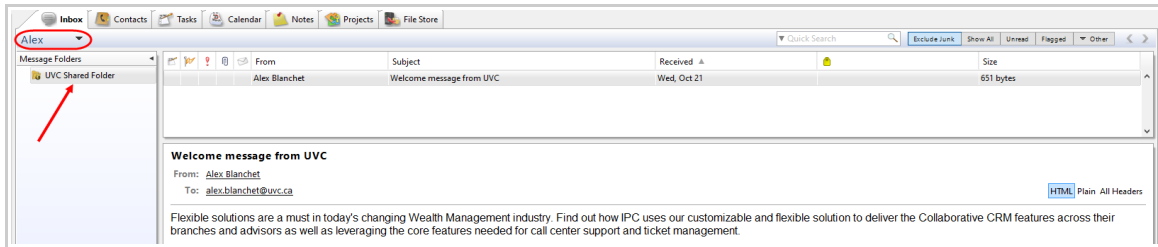
- (4) As seen below in this scenario I will be sharing the **UVC Shared Folder** with *AlexTest1*. Your fourth and final step is to click the **OK** button to confirm and save your changes.



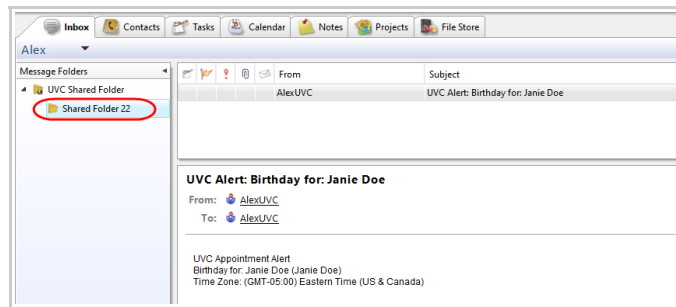
When *AlexTest1* log in to UVC he will be able to see two different email **Inboxes**. They will be accessible using the drop-down menu. One will be his own inbox (My Inbox) and the other is the shared one with *Alex* (*handlers name will appear*).



When *AlexText1* selects the *Alex* inbox he will see the UVC shared Folder emails.

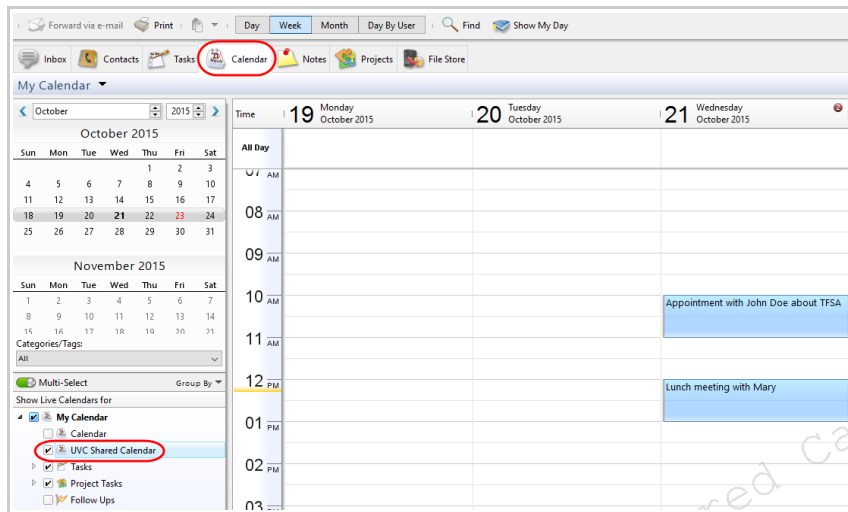


As explained above, under the **UVC Shared Folder** there's a sub folder entitled **Shared Folder 22**. If you also want a new or existing contact to have access to a sub folder then these **4 steps** will need to be repeated again for that sub folder. Once you do they will be able to see the folder and any emails within that sub folder.



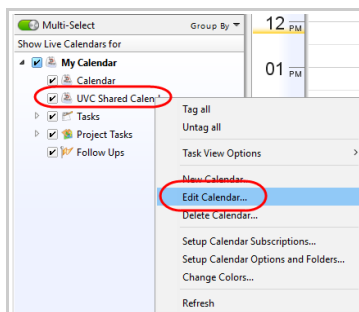
VII. SHARE YOUR CALENDAR WITH A UVC USER ON YOUR BUDDY LIST

You can also **share your Calendar** with a contact from your list. The same steps explained above, for sharing an email folder, also apply for this scenario but in this case we will be under the **Calendar Module**. In this example we will be sharing the **UVC Shared Calendar** with *AlexText1*.

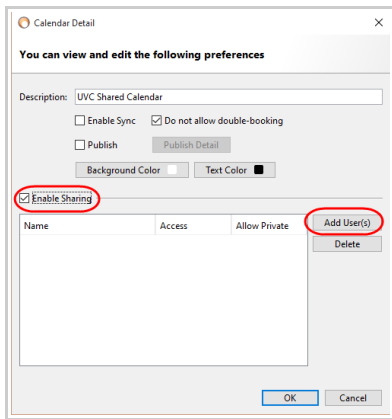


Please use the following steps to share your calendar with a contact from your list.

- (1) First right click on the **Calendar** you want to share with this contact. Then click on **Edit Calendar**.



- (2) Your second step is to make sure to add to check mark on the option **Enable Sharing** and then click on the **Add User(s)** button.



- (3) Your next step is to add a **check mark** next to the user that you want to share your calendar with and then select the **Access Level**.

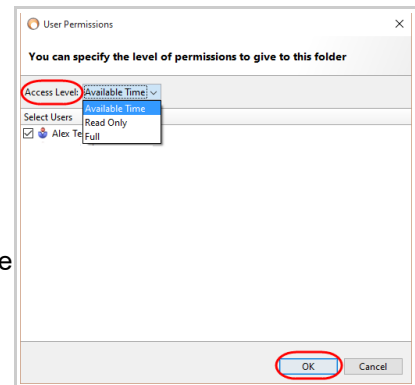
Available Time level will only show the available time (busy or free) that you have under that calendar. No appointment details will be shown on your busy time.

Read Only access level will provide the user the ability to read the details of all your appointments but will not be able to create or modify any of them.

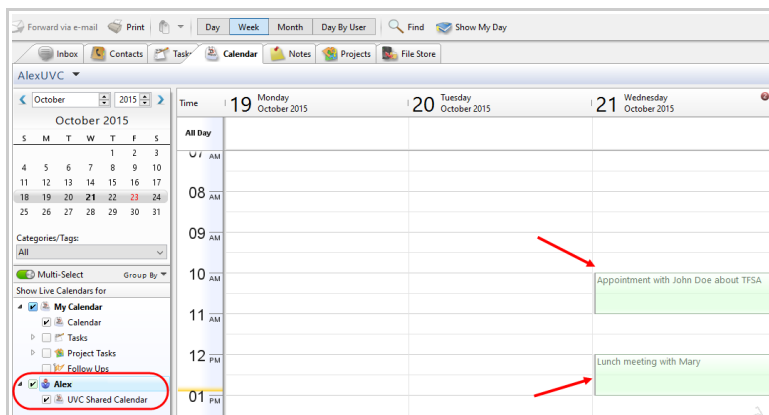
Full access level will give the user the ability to read, modify, create and move the appointments and tasks to different day, month or year.

Special access level will give the user the ability to read and create new appointments only.

It's a matter of preference but usually **Full** access is suggested. Click the **OK** button to apply your selection. Click the **OK** button again to save your changes.



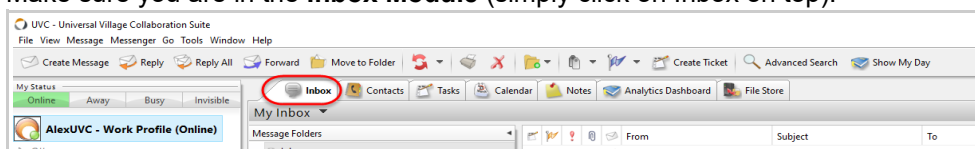
When *AlexTest1* views his calendar he will also be able to see the *Alex* calendar once it's selected.



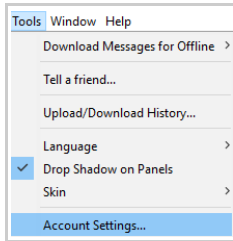
VIII. CREATE A TEXT E-MAIL SIGNATURE

Use the following steps to add a text signature to your e-mail account.

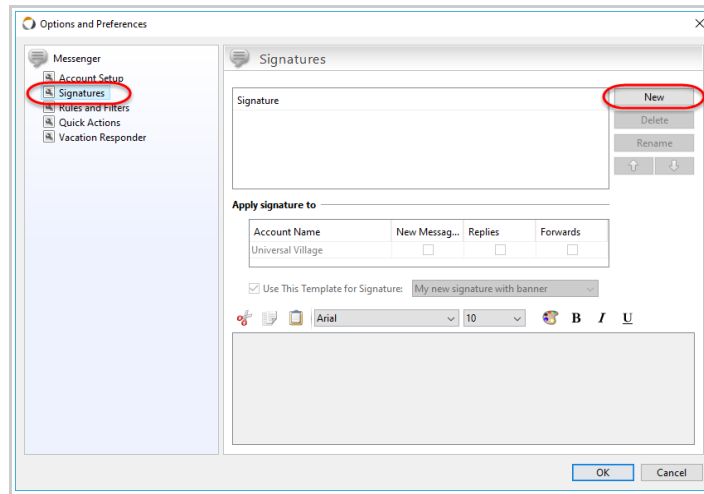
- (1) Make sure you are in the **Inbox Module** (simply click on Inbox on top).



(2) Click on **Tools -> Account Settings**



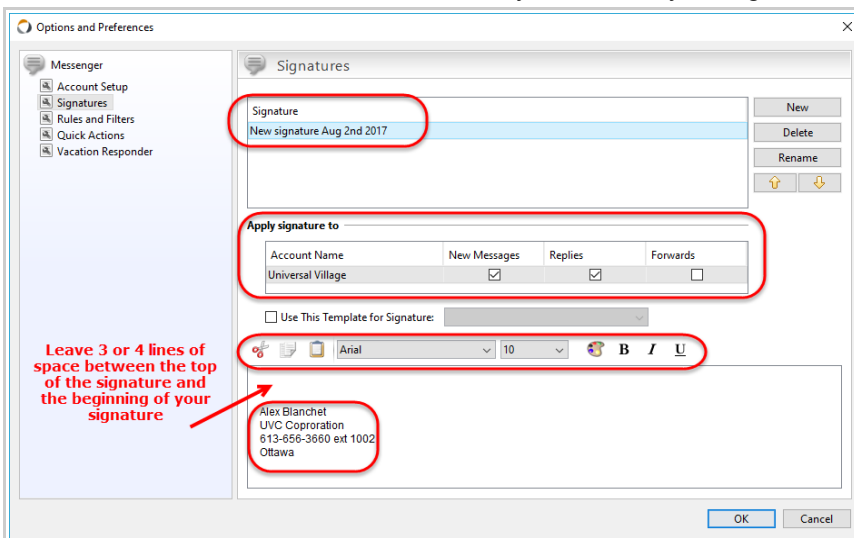
(3) Click on **Signatures** and then click on **New** button.



(4) **Rename** your signature to the name you want (when you click on the new button you will either see *Default* or *New* as the name of the signature which you will need to change). Press the **Enter** key to save the name of your new signature.



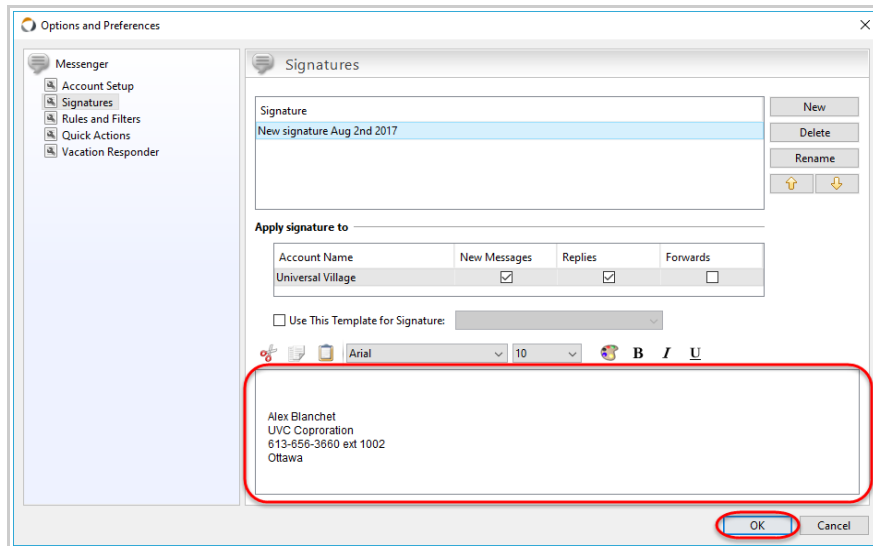
(5) Next **select** the signature you want to "edit". Under the **Apply signature to** option select which email account will be linked to that signature. Then select if that signature will be visible on **New Messages** and/or **Replies** and/or **Forwards**. Then select the font and font size and color you want for your signature.



- (6) Once the above have been selected, put your cursor in the white rectangle. We recommend leaving at least 3 or 4 lines of spacing before you start typing your signature. This spacing will allow the necessary space to start composing your e-mail. This avoids moving your signature at the bottom each time you type a new email.

Start typing your signature.

Click the **OK** button to save.



When you click on **New message** or **Reply** or **Forward** your text signature will be linked to the e-mail account you selected in **step #5** of this section, with the extra spacing to compose your e-mail.

