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Product Summary

Cospace is a team messaging and collaboration application featuring video conferencing, screen sharing, task management, and much more. Teams can stay in sync, no matter where everyone is located. Instantly hold meetings or send meeting invites to schedule ahead.

This document covers the following:

- Creating and joining open Spaces
- Chatting
- Sharing files
- Starting a conference call
- Screen sharing
- Scheduling and starting meetings
- Assigning and managing tasks

Product Requirements

A Team Collaboration license is required to take advantage of features detailed in the sections below. If the features described in this User guide are not available, please reach out to an Administrator.

Cospace requires:

- An active Internet connection
- Access to a web browser such as Google Chrome, Internet Explorer, or Mozilla Firefox
- An active Cospace account
Logging In

1. Visit www.nextiva.com, and click Client Login to log in to NextOS.
2. From the NextOS home page, select Cospace.

3. On the Cospace login screen, click Login, enter your company email address and click Next.
4. Enter the PIN sent to the email address and click Activate.

Creating a Space

Create a Space to collaborate with multiple members via chat, video, screen share, or audio. Store chat history and all shared files and links in one central location. All joined Spaces will appear on the left panel of the Cospace window.

1. Click the orange Plus (+) icon in the left panel > Create a Space.
2. Enter a name for the Space > **Next**.
4. Click **+Add**. Select the Members to invite > **+Add** > **Next**.
3. Specify the privacy level of this Space > **Next**.
   - **Private Space:** Only the people added as Members can join the Space.
   - **Unlisted Open Space:** Anyone with a link or code can join the Space.
   - **Listed Open Space:** Anyone can join.
Privacy of the Space

5. Click **Create**. The Space appears in the left panel of the Cospace window.

Joining Open Spaces

1. Click the orange **Plus (+)** icon > **Add from Directory**.
2. In the **Team Spaces Directory** window, click +Add for the corresponding public Space. The Space will then appear in the left panel of the CoSpace window.

![Team Spaces Directory Window](image)

**Managing Spaces**

In the left panel, select the Space you want to manage. Click the **Angle Bracket** icon on the right side of the window to expand the right panel, which displays all Members of the Space.

Members can perform the following actions from the right panel:

- View Space rules
- Quit a Space

Administrators of a Space can perform the following additional actions:

- Add Members
- Remove Members
- Add additional Administrators
- Edit Space name
- Edit Space settings
- Delete a Space
Viewing Space Rules

Click the Gear icon in the right panel > View Space Rules.

 Quitting a Space

Click the Gear icon in the right panel > Quit this Space.

Adding Members (Administrators only)

Click the Plus (+) icon under Members in the right panel. Select the member(s) to invite > +Add.
Removing Members (Administrators only)

Select the Member > Trash Can > Remove.

Adding an Administrator (Administrators only)

Select the Member > Key > Confirm.

Editing Space Name (Administrators only)

Click the Space name in the right panel > modify the name > Enter to save.

Editing Space Settings (Administrators only)

Click the Gear icon in the right panel > Space Settings. Modify the settings > Save.

Deleting a Space (Administrators only)

Click the Gear icon in the right panel > Delete Space (permanent).
Chatting

Members can chat and share files with other members directly in Cospace. Chat one-on-one or as a group.

1. In the left panel, select the desired Member or Space.
2. In the text box at the bottom of the window, compose a message:
   - Add a new post by typing a message in the text box at the bottom of the window.
   - Respond to an existing post by clicking Reply and typing a message in the text box at the bottom of the window.
   - Insert emojis via the Emoji icon.
   - Share files via the Paper Clip icon.
3. Press Enter or click the orange Check Mark icon to send.
   NOTE: Edit or remove a posted message by clicking the message and selecting Edit or Remove.
Sharing Files

1. In the left panel, select the desired Member or Space.
   
   **NOTE:** Sharing files in a Space makes the files accessible to all Members in that Space.

2. On the right side of the text box at the bottom of the window, click the Paper Clip icon.

3. Select the file(s) to share > Open. The files upload to the Cosp ace chat feed as a new post.

**Chat Feed in a Space**

Viewing Shared Files

Files shared in Cosp ace are accessible in three ways:

- All files shared between you and all Members
- Files shared only between you and a specific Member in Cosp ace
- Files shared only among Members of a specific Space
Viewing All Shared Files

Click the **Files** icon at the bottom of the left panel within the Cospace window. View all files shared between you and all Members here. Click on the desired file to view or choose the **download** icon (top-right).

![Files Icon](image)

Viewing Files Shared with a Member or Space

In the left panel, select the desired member or Space. Expand the right panel (click the **Angle Bracket** icon on the right side of the window) > **Files**.
List of Files Shared with a Member

Starting a Conference Call

In the left panel, select the desired Member or Space and click the orange Phone icon at the top-right corner of the Cospace window to initiate the call. Initiating a conference call within a Space will call all Members of the Space.
The following controls are available during a conference call:

- **Mute**: Click the **Microphone** icon to turn Mute on and off.
- **Video**: Click the **Video Camera** icon to turn Video on and off.
- **Fullscreen**: Click the **Four Squares** icon to maximize or minimize the purple call area.
- **Screen share**: Click the **Screen** icon to share your screen.
- **End call**: Click the **Handset Down** icon to end the call.
Starting a Screen Share

During a conference call, click the Screen icon at the bottom of the screen. Select the screen or application window to share > Share. To stop screen sharing, click the Screen icon again.
Scheduling a Meeting

1. Click the orange Plus (+) icon > Create a Meeting.

![Create a Meeting Option](image)

2. Complete the Meeting form > Save.

   **NOTE:** If a Related Space is not selected, a temporary Space will be created for this meeting.
Meeting Form
Starting a Meeting (Unscheduled)

1. Click **Start a Meeting** at the top of the left panel.
2. Click the **Call (handset)** icon in the main panel.

3. Select the Members to include in the meeting > **Continue**.
4. Click **Call Now** or **Later**. *A temporary Space will be created for this call.*
Joining a Meeting

1. Click the orange Plus (+) icon
2. Select Join a Meeting.

3. Enter the 8-digit PIN provided by the host > Join.
Meeting Management

Click the Meetings icon on the left panel to view all Meetings. Select one.

Editing Meetings

To edit the settings, click Edit and make the necessary changes. Click Save.
Removing Meetings

To remove a meeting, click **Remove Meeting > Remove**.

![Meeting Window](image)

Creating Tasks

Stay on track with your own to-do list and collaborate easily by assigning tasks to other team members.

1. Click the **Tasks** icon on the left panel.
2. Click the **Plus (+)** icon at the top-right corner of the Cospace window.
3. Complete the **Task** form and click **Save**.
Managing Tasks

Click the **Tasks** icon on the left panel of the Cospace window to view all assigned Tasks.

View Tasks

Viewing Tasks Related to a Member or Space

In the left panel, select the Member or Space. Expand the right panel (click the **Angle Bracket** icon on at the right side of the window) > **Tasks**.
Related Tasks

Updating Task Status

Open a Task and select a Status from the drop-down list, such as In progress.
Editing or Removing Tasks

Open the desired Task.

- To edit a Task, click **Edit**. Make the necessary changes > **Save**.
- To remove a Task, click **Remove Task** > **Remove**.

![Task Window]

**Task Window**

Syncing to Google Calendar

Sync all Cospace meetings and tasks to Google Calendar, keeping all events in one place.

1. Click the **Calendar** icon on the bottom left panel of the Cospace window.
2. Click the **Sync to Google Calendar** button at the top-right corner of the window.
3. Choose an account in Google popup window.

4. Click **Allow** to let NextOS Calendar access the Google Calendar. The Google account selected will be displayed under the **Sync to Google Calendar** button.