MaX MEETING
Standalone App
User Guide

MOMENTUM
T E L E C O M

Powered by: **metaswitch**

Notices

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1   Description

The MaX Meeting client is a full featured web and video conferencing service that adds Web, Video, and Audio conferencing capabilities for up to 500 participants, although you may be restricted to holding meetings with fewer participants. Meeting generally supports up to 100 participants but can also be restricted to small meetings of up to 4, 10, or 25 participants, or extended to large meetings for up to 500 participants.

This document describes how to use the features and functionality of MaX Meeting, the standalone client.

2   Accessing the MaX Meeting Client

The Meeting client can be downloaded on to a desktop or mobile device.

- On a desktop, you can download it from CommPortal or via a download URL.

- On a mobile device, you should download it from Google Play or the App Store.

2.1   Downloading and Installing the Meeting Application from CommPortal

If you have CommPortal, you can download the Meeting client from your CommPortal page.

1.   Log in to CommPortal from your browser using the URL provided by your service provider.

2.   Click on the *Download* link on the bottom left of the CommPortal Home page.
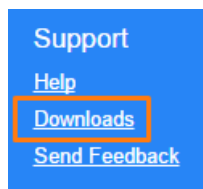
3.   This launches the Apps page shown below.
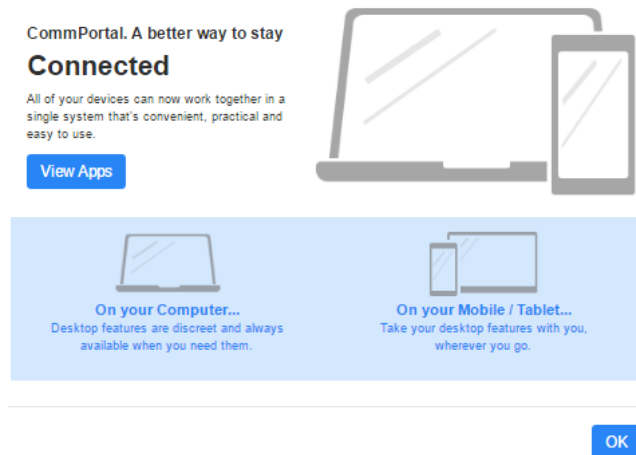
4. Click *On your Computer …* or *On your Mobile* and then select *MaX UC*.

Once the application is downloaded to your computer or your mobile device, double-click on the file to run the installer and follow the directions to install the application.

Once the install is complete:

1. Choose *Sign In* from the opening screen.

2. If prompted, select your service provider's name from the list provided.

3. Log in with the same credentials as you used with CommPortal. Your phone number or email address may already be present in the login screen and you will only need to enter your password.

2.1.1 Downloading and Installing the Outlook Calendar Plugin

The Outlook Calendar plugin allows you to schedule and start an instant meeting directly from your Outlook calendar. You can also download the Outlook plugin from the CommPortal Apps page.

1. Launch the Apps page again by clicking on the *Download* link on the bottom left of the CommPortal screen.

2. Click *On your Computer …* and then select *Meeting - Outlook Plugin*.

Once the application is downloaded to your computer, double-click on the file to run the installer and follow the directions to install the application.

You will then see the following **Schedule a Meeting** and **Start Instant Meeting** icons in your Outlook client.
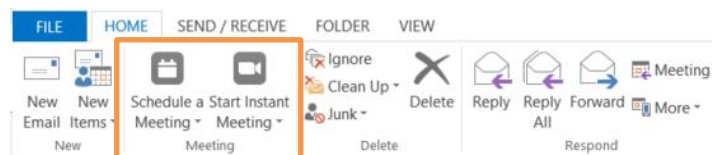
2.2   Logging in to Meeting

When you start the Meeting client, for example when you download it using a URL from your service provider or if you restart your PC, you will see the **Login** page. If you are logging in to Meeting for the first time, your service provider will have told you the password that you should use.

To log in:

1. If required, enter your phone number or email address in the **Number** box.

    - Your phone number or email address may already be filled in.

2. Enter your password in the **Password** box.

3. If you want to change your password, also tick the **Change Password** checkbox.

4. Click **Login**.

    - If you entered a valid password, you will see the Meeting home screen.

    - If you need to change your password, you will see the **Change Password** dialog described in 2.3. This will happen if

        - you ticked the Change Password checkbox

        - you have not changed your password from the one originally provided by your service provider

        - your current password has expired.

2.3   Changing your Meeting password

It is important that you protect your MaX Meeting password to prevent anyone fraudulently using your account.

As noted in 2.2, you will be prompted to change your password when you first log in to Meeting using the password provided by your service provider, or if you attempt to log in with a password that has expired.

To change your password:

1. Log out of the Meeting client.

2. Start the Meeting client.

3. On the login screen, enter your telephone number and current password and tick the **Change Password** checkbox.

4. You will then see the **Change Password** screen.

5. Enter the new password in the Password box, and then retype the password in the Confirm Password box to confirm it.

6. Click **Change**.

7. You will then see the Meeting home screen.

    Note that you do not need to log in again with the new password immediately after changing it. However, you must remember to use the new password the next time you log in.

3   On Demand and Scheduled Meetings

You can create on demand or scheduled Meetings using either the Meeting client or Outlook Calendar.

3.1   On Demand and Scheduled Meetings Using the Meeting Client on desktop

You can create an on demand Meeting or schedule an Meeting from the Meeting client directly or by using the Meeting Outlook calendar plugin.

3.1.1   Scheduling a Meeting from the Meeting Client

From the Meeting client click on the **Schedule** button as shown below.
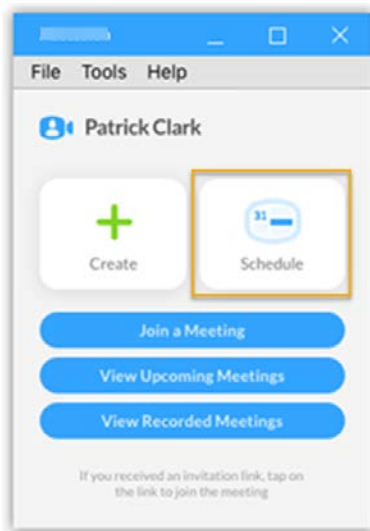
The **Schedule a new meeting** dialog window will appear

- Select the time and date for your meeting in the **When** section.

- Use the **Video (when joining a meeting)** section to set the default video settings for yourself and the participants. When **On** is selected, video will automatically be started when you join the meeting.

- Use **Audio Options** to select how participants can connect for the studio portion of the meeting.

- Use the **Meeting Options** to:

  - Set and require a password to be entered before a participant can enter a meeting

  - Enable participants to join the meeting before you join the meeting

  - Choose whether to use your Personal Meeting ID for this meeting.

- If you opt to use your Personal Meeting ID, you should secure your meeting by either requiring a password or not enabling participants to join the meeting before you do. If you do not take either of these steps, someone else who knows your Personal Meeting ID may be able to hijack your meeting.

- You can use options on the **Advanced Settings** page in Meeting to edit your Personal Meeting ID and Personal Link. However, changing this will change it for all meetings that you have currently scheduled.

- Choose whether only users who are logged in to a Meeting client or follow a URL on a device that is running a logged in Meeting client can join the meeting. This prevents unauthorized users from joining your meeting.

- Choose whether you want to automatically record the meeting on your local computer. You can use a setting in 10.5.4, Recording Settings to set Meeting to automatically record each meeting as soon as it starts.

- Use the **Calendar** section to select the format for the invitation, including Outlook, Google and Other/Generic calendars.

3.1.2 Creating an On-Demand Meeting from the Meeting Client

To create a meeting on demand from the Meeting client click on the **Create** button.
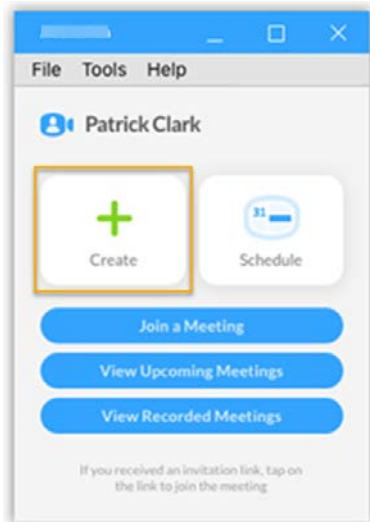
You will then see the **Create a Meeting** screen.
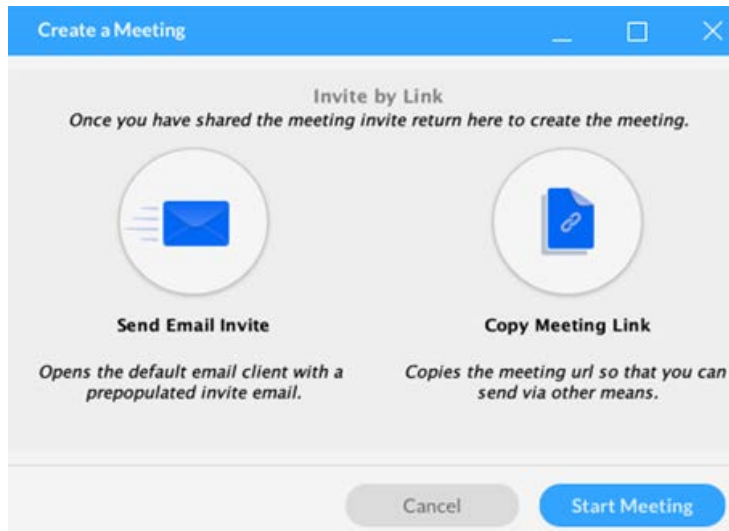
- Invite people to attend your meeting. You can do this by clicking the **Send Email Invite** button to open a new email in your default email program with all of the information needed for people to join your meeting. You will need to fill in the email addresses of the contacts to receive the invite in the **To:** field of the email. You can also click the **Copy Meeting Link** button to copy the meeting details to the clipboard if you want to send this by other means, for example by text message.

- You must click **Start Meeting** to begin the meeting. You can then also use the in-Meeting options to invite more participants to join the meeting.

3.1.3   Adding a SIP or H.323 Room System to your Meeting

Once you have started your meeting, you can easily add a SIP or H.323 Room based conference system using one of the following two methods.

You can dial out to the Room system using either the IP address or phone number of the conference room system. When the participants using the conference room system answer your call, they will be added into your Meeting.
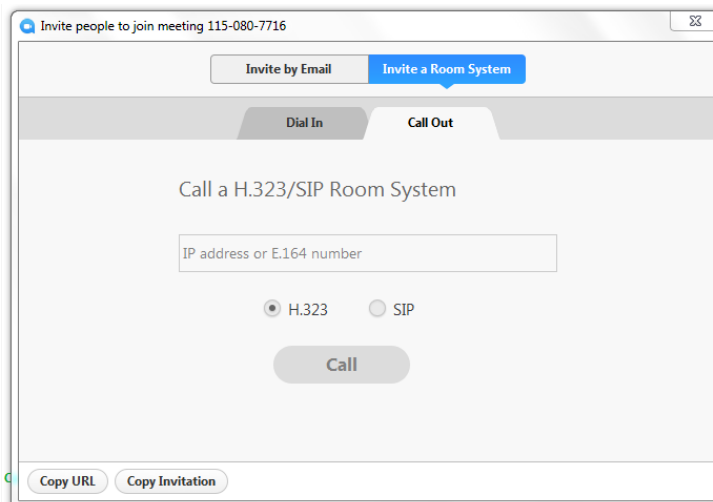
You can provide the IP Address and Meeting ID to the participants joining from the Room System so that they can dial in. They can then enter the IP address into the conference room system and, when prompted, the Meeting ID, as shown in the example below.

You can join a meeting from a H.323 or SIP device in one of the following ways:

On a H.323 device, you can dial:

- The IP Address only, then enter the meeting ID on the welcome screen

- The IP Address##Meeting ID, for example: 192.168.3.142##213746932

- The MeetingID@IP Address, for example: 2139746932@192.168.3.142

    - This is supported on some Cisco/Tandberg devices.

On a SIP device, you can enter:

- The IP Address only, then enter meeting ID on the welcome screen

- The Meeting ID@IP Address, for example: 213746932@192.168.3.142

Supported SIP/H.323 Conference Room Systems

For a list of supported SIP and H.323 room systems supported by Meeting see Appendix A, Supported SIP/H.323 Conference Room Systems.

3.2 Schedule a Meeting from Outlook Calendar

If you have downloaded the plug-in, as described in 2.1.1, Downloading and Installing the Outlook Calendar Plugin, you will see new icons on the Outlook toolbar that enable you to schedule Meetings with a single click.
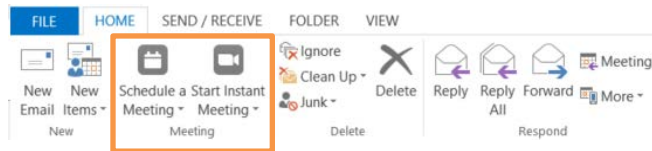
To schedule a Meeting, click on the **Schedule a Meeting** button and the following scheduling dialog window appears:
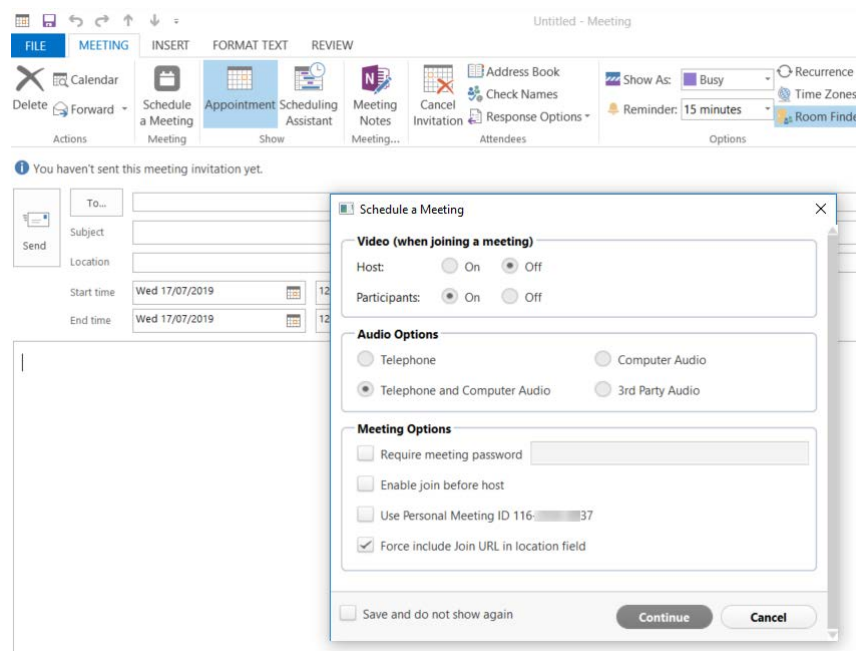
Use this dialog to set various options for the Meeting.

- Use the **Video (when joining a meeting)** section to set the default video settings for yourself and the participants. If you select **On**, video will automatically be started when you join the meeting.

- Use **Audio Options** to select how participants can connect for the studio portion of the meeting.

- Use **Meeting Options** to:

  - set and require a password to be entered before a participant can enter a meeting

  - enable participants to join the meeting before you join the meeting.

If these are the default settings you would like to use for all future meetings, tick the **Save and do not show again** button so that the next time you schedule a meeting these settings will be used and you will not see this screen. If you want to change these settings at any time, when you create a meeting select the **Change Settings** button from the Meeting calendar toolbar:
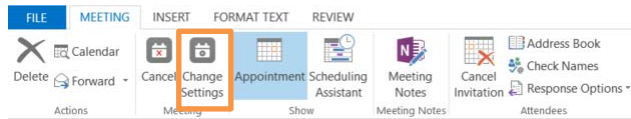
3.2.1 Starting an On-Demand Meeting from Outlook Calendar

To start an on demand meeting from your Outlook calendar, press the **Start Instant Meeting** button on the Outlook toolbar as shown below and your meeting will start.
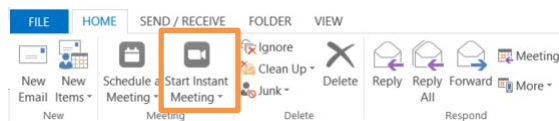
Once the meeting starts, you will need will invite people to your meeting as described in section 3.1.2.

3.2.2 Schedule a Teleconference Only Meeting

You can schedule a meeting in which the host will be dialing into the meeting. You can do this using any of the scheduling options described in this manual. However, you must ensure that you tick **Enable join before host** on the **Meeting Options** panel when scheduling the meeting.

3.3 On Demand Meetings Using the Meeting Client on mobile

You can create an on demand Meeting from the Meeting client on your mobile device.

- Launch the Meeting mobile client.
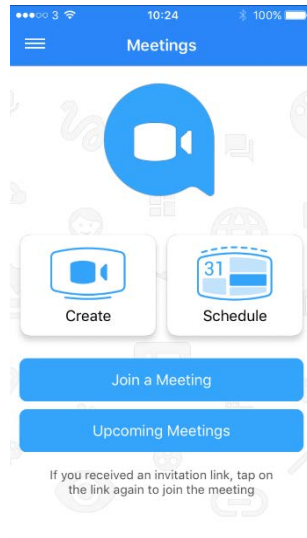
- Select **Create**.

- You will then see a screen where you can invite people to join your meeting in any of the following ways.

    - Generating an invitation URL that is sent using SMS.

    - Sending an invitation email that includes the Meeting URL.

    - Dialing out to a manually-entered phone number or a device contact.

4   Connecting Audio and Video

Meeting uses the OPUS HD voice codec for connecting calls via your computer. Because OPUS supports HD voice, you may notice that your audio connections sound best when connecting via your computer.

4.1   Dial-in Connections from the Meeting Client

Users connecting to dial-in audio from the client should carry out the following steps:

1. Click on the **Join Audio** button on the lower right of the window.

2. Select the **Join by Phone** tab.
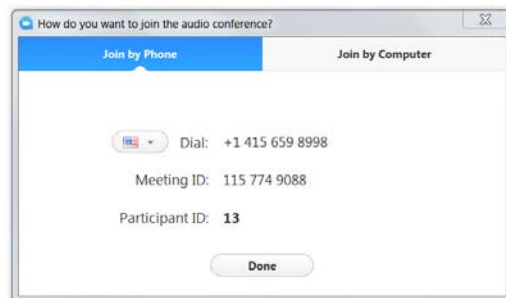
3. Select the country that you are calling from using the dropdown next to the **Dial** field.

4. Dial the number as listed in the **Dial** field.

5. At the audio prompts, enter the Meeting ID and Participant ID as shown on the **Join by Phone** tab.

6. If you are connected via your computer, you will need to enter your Participant ID. This will associate your audio with your video session.
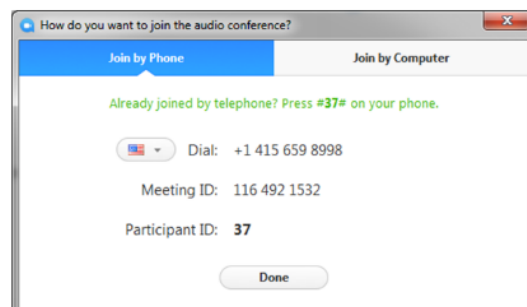
Note: If you forget to enter your Participant ID when joining the meeting you can also enter your Participant ID any time after enter the meeting by dialing #*participant_ID*# (replacing *participant_ID* with your ID) from your DTMF phone. Instructions for this are shown on the audio options window.

4.2   Dial-in Connections from the PSTN

To dial into a meeting from the PSTN, you will use the dial-in number listed on the meeting invite. If you do not have a dial in number, you must contact the meeting host to obtain the number.

If you are the host, you will need to open the meeting to obtain the dial-in number. If you are the host and will be joining from a dial-in number, you must schedule the meeting with the **Enable join before host** option enabled.

4.3   Connecting Audio from Your Computer

You can easily connect your computer audio to a meeting, but this works best if you have an audio headset connected to your PC. After joining or starting a meeting, click **Join Audio by Computer** to connect your computer's speaker and microphone to the Meeting.
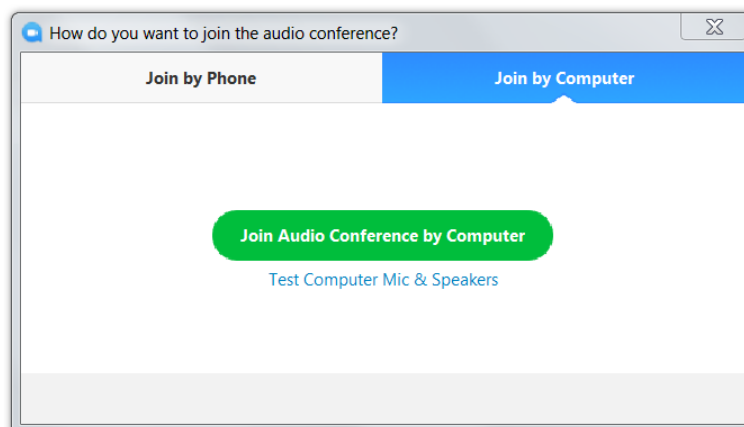
If using your computer's speaker and microphone is your preferred audio method, you can set Meeting to always automatically connect your audio via your computer. To set this in Meeting go to **Settings >Audio** and select the "**Automatically Join Audio by Computer when joining a meeting**".

Once in the meeting, you can mute/unmute by clicking on the mute button on the bottom left side of the menu bar. You can also mute/unmute pressing "Alt + a" on your keyboard. Once in the meeting, you can mute/unmute yourself by clicking on the mute button on the bottom left side of the menu bar or by pressing **Alt + a** on your keyboard.

4.4   Configuring and Testing Computer Audio

You can configure and test your audio from the **Settings** option in Meeting.

1.   Go to *Settings > Audio.*

2.   Select the **Test Computer Audio** option.
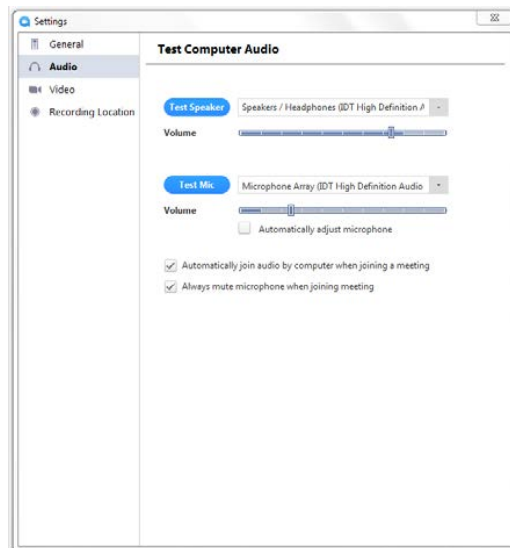
4.4.1   Test Speaker

The **Test Speaker** settings allow you to control the receive speaker portion of the audio portion of your audio device.

1.   Select your headset/speaker audio device that you will use to receive audio from your computer using the dropdown.

2.   Adjust the headset/speaker volume using the sliding volume bar.

3.   Verify your headset/speaker volume by pressing the **Test Speaker** button, which will play sound over your selected device.

4.4.2   Test Mic

These settings allow you to control the transmit microphone portion of your audio device.

1.   Select the headset or device that you will use to transmit your voice using the dropdown list.

2.   Adjust the microphone volume using the sliding volume bar.

3.   Use the **Test Mic** button to record a sample that you can then play back to hear the quality of your headset microphone.

4.5   Managing Your Video Settings

You can manage your video settings in Meeting.

1. Go to *Settings > Video.*
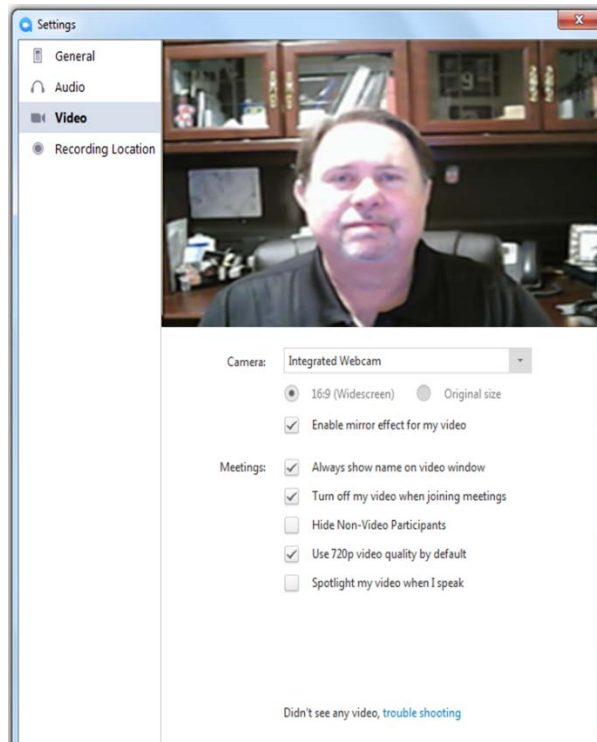
2. Set up your camera.

    •   Select the camera you wish to use using the dropdown list.

    •   Select either 16.9 video or use the original size from your camera

    •   Check or uncheck **Enable mirror effect for my video**. This option allows you
        to see left and right as if looking into a mirror vs as seen by the camera.

3. Configure your Meetings Settings using the check boxes to set or clear the
    following options:

    •   **Always show my name on video window** – Display's your name in the
        video window

    •   **Turn off my video when joining meetings** – Ensures that you will join
        meetings with your video turned off.

- **Hide Non-Video Participants** – Hides non-video users from the video window.

- **Use 720p video quality by default** – Enable HD video as the default.

- **Spotlight my video when I speak** – Places a spotlight around your video display when speaking

4.5.1   Sharing your Video in a Meeting

To share your video while in a Meeting, you can simply press [Start Video], the **Start Video** button located at the lower left of the Meeting screen.

To stop sharing your video, simply press [Stop Video], the **Stop Video** button that will have replaced the **Start Video** button described above.

4.6   Viewing Participants Video in a Meeting

The host and all participants can share their video simultaneously in a Meeting. There are two ways to view everyone's video: **Active Speaker** and **Gallery** mode.

- In **Active Speaker** mode, you will just see the video of the person who is currently speaking.

- In **Gallery** mode, you will see up to 25 video feeds on your screen and the active speaker will be highlighted, as shown below. When there are more than nine people in the meeting, you will see a scroll arrow that you can use to scroll through the video feeds.

    - If you are in a Meeting on Accession Mobile, you can toggle between **Hide/Show my Video in Gallery View** to hide or show your own video on your own screen.

5   Sharing your Screen

There are a number of different options for sharing your screen during a Meeting. Multiple participants can share their screen simultaneously.

If you are a Meeting host, you can use an attention tracking feature to check whether participants have Meeting in focus when someone is sharing their screen. This setting must be enabled in your Advanced Settings prior to starting the meeting, as described in 10.5, Advanced Options.

5.1   Share Desktop
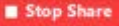
You can share your Desktop. Using this option will share your entire desktop with the other participants in the meeting.

It is important to remember that others see exactly what you are seeing or typing on your screen when using the Share Desktop option. You must be very careful that you are only displaying the screens you want to share and have closed any other windows or applications so that meeting participants cannot see anything that you do not want to share.

To share your desktop in a Meeting, click , the Share icon located at the bottom of the Meeting screen.
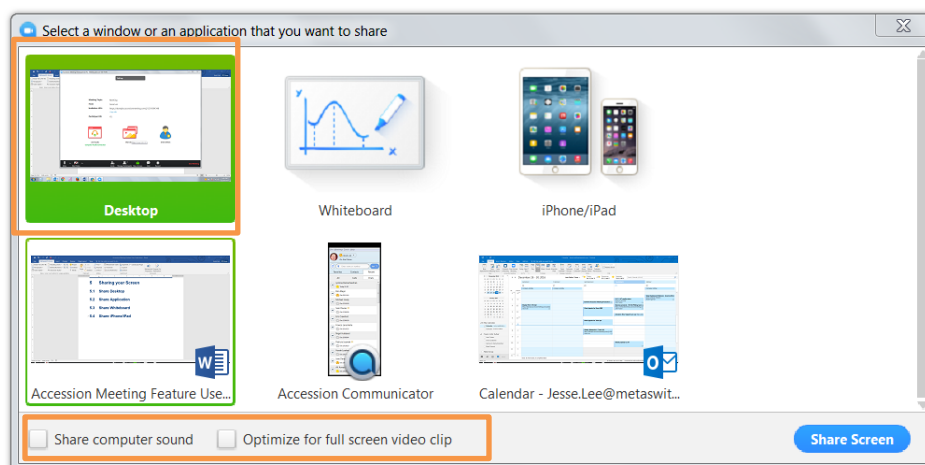
1.   Select the **Desktop** as highlighted in the screenshot.

2.   If you plan to share sound from your PC and/or will be showing video, select the checkbox(es) for **Share computer sound** and/or **Optimize for full screen video clip** as highlighted in the screenshot.

3. Press the **Share Screen** button. Your screen is now viewable by everyone in the meeting.

4. To pause the screen, press [Pause Share], the **Pause Share** button at the top of the screen. When this button is active, other participants will see a snapshot of the screen that was being shared when the **Pause Share** button was pressed. They will continue to see this view until you press either [Resume Share], the **Resume Share** button, or [Stop Share], the Stop Share button.

5. To stop sharing your desktop, press [Stop Share], the Stop Share button.

5.2   Share an Application

You can share an application, for example Microsoft Word. Using this option will share only the application that you select. Participants of the meeting will be able to see only the application selected. If you change to anther application, the meeting participants will be unable to see the other application.

NOTE: There may be certain conditions where a small area around the application being shared is also viewable. This is a limitation on Windows and is not directly related to the Meeting application. However, as when sharing your Desktop, you must ensure you have closed any other windows or applications so that meeting participants cannot see anything that you do not want to share.

To share a specific application in a Meeting, press [Share Screen], the Share icon located on the bottom menu bar.

1. Select the application that you wish to share - example, *Word*, as shown above.

2. If you plan to share sound from your PC and/or will be showing video, select the checkbox(es) for **Share computer sound** and/or **Optimize for full screen video clip** as highlighted in the screenshot.
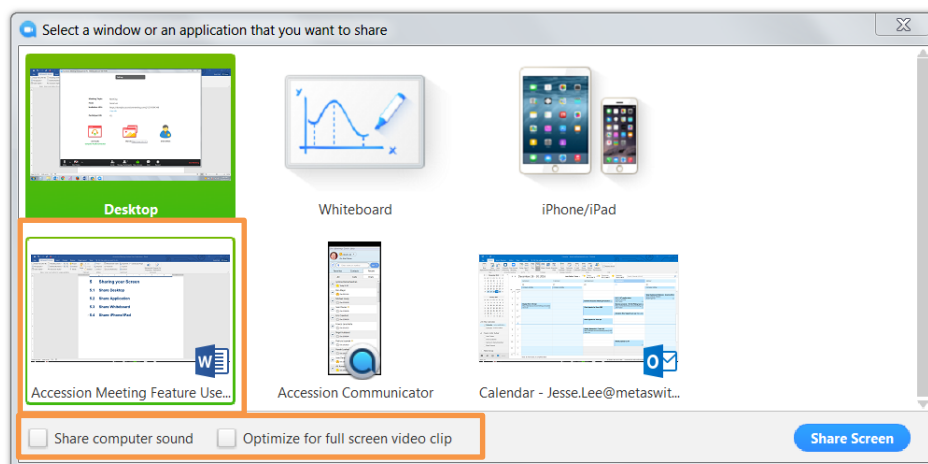
3. Press the **Share Screen** button. Your application is now viewable by everyone in the meeting.

4. To pause the screen, press , the **Pause Share** button at the top of the screen. When this button is active, other participants will see a snapshot of the screen that was being shared when the **Pause Share** button was pressed. They will continue to see this view until you press either , the **Resume Share** button, or , the Stop Share button.

5. To stop sharing your application press , the **Stop Share** button.

5.3   Share Whiteboard

You can share a whiteboard. This option allows you to open a blank whiteboard that can be annotated by the host and participants using the annotation tools described in section 7.

To share your whiteboard in a Meeting, press the **Share** icon located on the bottom menu bar.
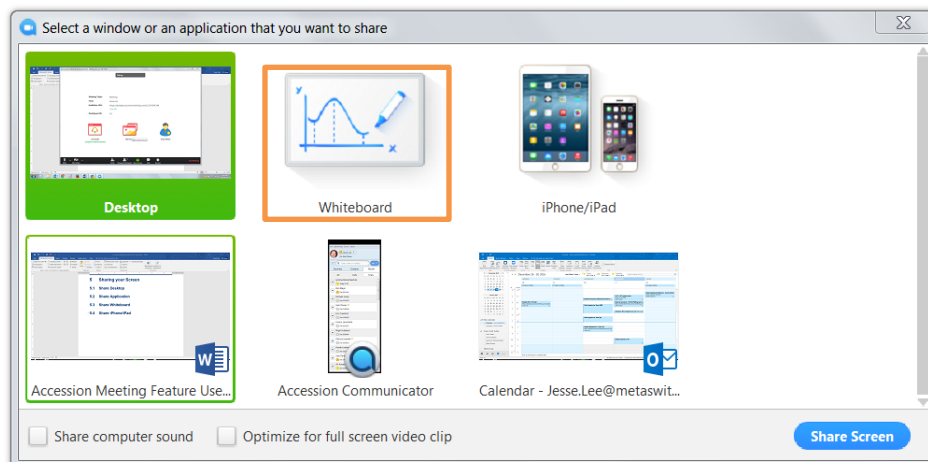
1. Select the Whiteboard as highlighted above.

2. Press the **Share Screen** button. Your whiteboard is now viewable by everyone in the meeting.

3. To pause the screen, press , the **Pause Share** button at the top of the screen. When this button is active, other participants will see a snapshot of the screen that was being shared when the **Pause Share** button was pressed. They will continue to see this view until you press either , the **Resume Share** button, or , the Stop Share button.

4. To stop sharing your whiteboard press , the **Stop Share** button.

5.4   Share iPhone/iPad

You can share your iPhone or iPad screen with the meeting participants.

Meeting allows for true iOS screen sharing from iPhone and iPad through iOS mirroring. You can now share any application running on you iOS device through a Windows Meeting client The Meeting client acts as an AirPlay server to connect your iOS device to for sharing.

To download the iPhone/iPad sharing Plugin, you can simply click on the option to share iPhone/iPad in the Meeting client (shown below).
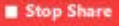
To share your iPhone or iPad in a Meeting, press the **Share** icon located on the bottom menu bar.
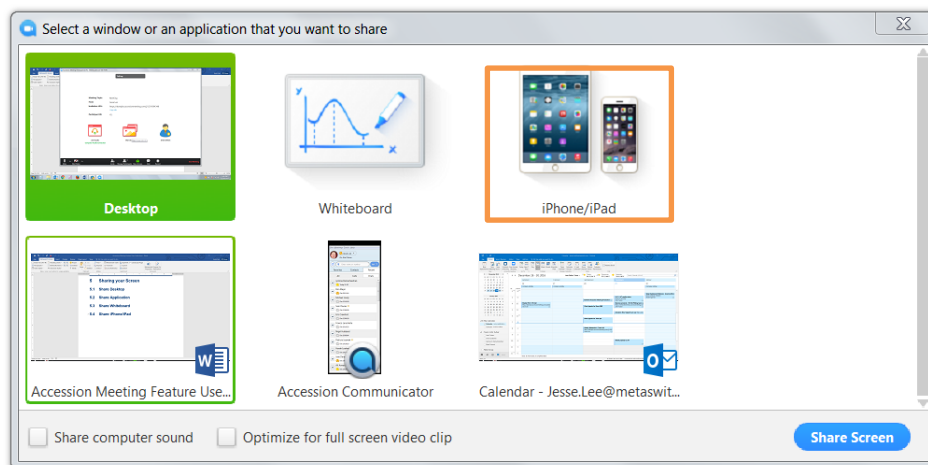
1. Press the **Share Screen** button and you will see instructions for connecting to Airplay. Note: If you are prompted to allow Airhost.exe to install, select Yes.
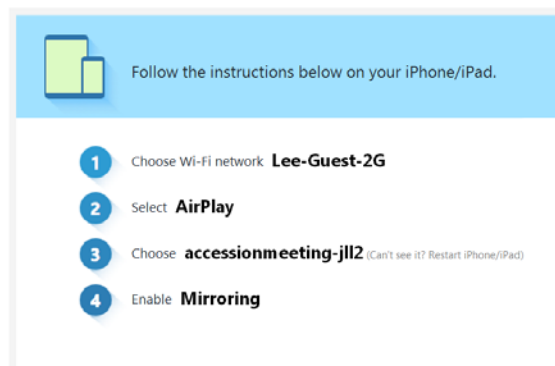
2. Follow the instructions provided to connect your iOS device

   - Swipe up from the bottom on your device to bring up the menu

   - Click on the **AirPlay** button and select the Meeting option

- Turn on **Mirroring**

3. You are now sharing your iPhone/iPad screen. You and your meeting participants will see the iPhone/iPad screen in the Meeting client.

4. To pause the screen, press [Pause Share], the **Pause Share** button at the top of the screen. When this button is active, other participants will see a snapshot of the screen that was being shared when the **Pause Share** button was pressed. They will continue to see this view until you press either [Resume Share], the **Resume Share** button, or [Stop Share], the Stop Share button.

5. To stop sharing your iPhone or iPad press [Stop Share], the **Stop Share** button.

5.5   Request or Give Desktop Remote Control

5.5.1   Request Desktop Control

While another participant is sharing their screen, you can request control of their mouse and keyboard. To request desktop control, use the following steps:

1. Once the user has started sharing, locate the tool bar menu drop down at the top middle of your in meeting window - as illustrated by **You are viewing Michael's screen** below.
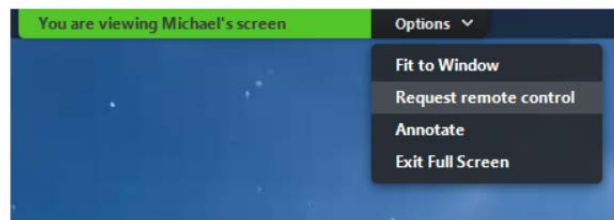
2. Next, select the **Request remote control** option. This will then send a notification to the host or participant who is currently sharing their screen, asking them whether or not they wish to allow you to control their screen.

5.5.2   Give Desktop Control

While sharing your desktop, you may give a participant control of your mouse and keyboard. To give desktop control use the following steps:

1. First, you must already be sharing your screen.

2. Next, move your mouse to the top of your meeting window/screen to toggle the drop-down screen sharing menu.

3. Select **Give mouse/keyboard control to** and then select the participant to whom you want to give control. The participant can click anywhere on their screen to start control.
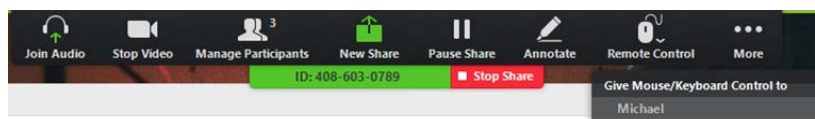
6   Using Meeting Chat

The in-Meeting chat service ensures that all of your meeting participants are able to send and receive chat messages.

6.1   Using Public and Private Chat

There are two types of chat messages in Meeting:

- public messages that are viewable by everyone in the meeting

- private messages that you can send to a specific participant in the meeting.

To use chat while in Meeting, click on , the Chat button on the bottom menu bar.

The chat window will open as shown below.
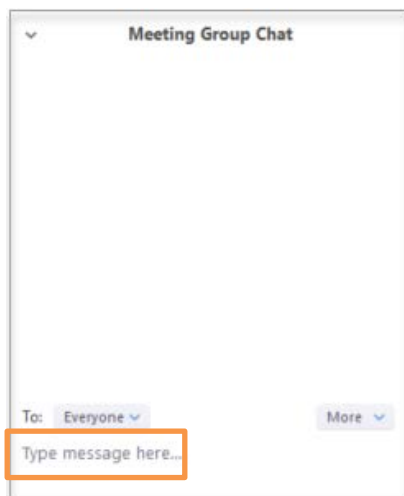
- To send a chat message to all participants in the meeting, select **Everyone**.

- To send a private message to one individual participant, select the participant's name from the dropdown list using the arrow alongside **Everyone**. You must have enabled Private Chat in your Meeting settings, as described in 10.5.2, In Meeting (Basic) to use this option.

- Type your message in the space at the bottom of the screen.

6.2   Saving Chat Logs

You can save your chat log as shown below.

1.   Select the **More** button at the bottom of the chat screen.

2.   Select **Save Chat**.
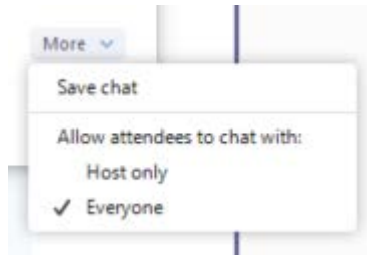
7   Using Annotation Tools

When sharing content or in a whiteboard session, there are a large number of Annotation Tools that are available for the host and participants to use for annotating documents or whiteboards.

You can access the Annotation Tools toolbar while you are sharing a screen or a whiteboard by pressing the **Annotate** button in the top toolbar in Meeting.
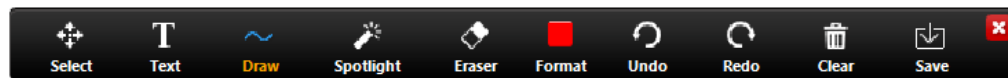
The following tools are available on this toolbar.

- **Select** – Allows you to select an area on the screen by clicking and dragging the mouse pointer across the screen.

- **Text** – Allows you to insert a text box on the screen by clicking and dragging the mouse pointer across the screen. Once the text box has been drawn, you can enter your text by typing in the box.

- **Draw** – Provides a range of drawing tools that can be selected and then used to annotate shared screens or whiteboards.

- **Spotlight** - Provides an arrow or a red dot that you can use to point to a particular spot in the document or whiteboard that is viewable by all participants.
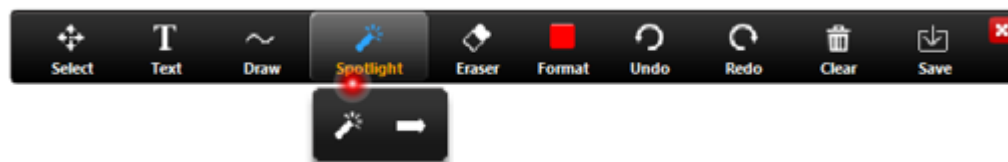
- **Eraser** - Allows you to delete any annotations you have already made.

- **Format** - Allows you to select the color used for your drawing tools. You should first select your drawing tool and then select **Format**. You can then select the color and line width as well as the fonts for the Text tools.

- **Undo** – Removes the last operation.

- **Redo** – Repeats the last operation.

- **Clear** - Provides you with options to clear your or other annotators' drawings.

- **Save** – Allows you to save your annotations.

8   Recording Your Meeting

A Meeting host can always record their own meetings. The host can also configure whether meeting participants can also record the meeting, as described in 10.5.4, Recording Settings.

When the Meeting is being recorded, the audio, video and screen share are recorded to an mp4 file, as well as an m4a audio only and a log of all chat traffic during the meeting is saved to the host of participants local or network storage device.

When the meeting is being recorded by multiple people, each participant records the meeting from their perspective. If one participant is watching in gallery mode and another in active speaker mode, each recording will look different.

You can replay a meeting recording from Meeting by selecting **Meetings -> Recorded** or by browsing to the default directory for your recording and selecting the individual recording files.

Note that there is a visual indicator in the upper left corner of the screen that is shown to all participants when anyone is recording the meeting.

9   Managing Meeting Participants

The host of the Meeting can manage all the participants in the meeting.

9.1   Host Participant Controls

The Host of the meeting has control over all functions and features in the meeting.

If you are the meeting host, you can access these controls by selecting , the **Manage Participants** button located on the menu bar.
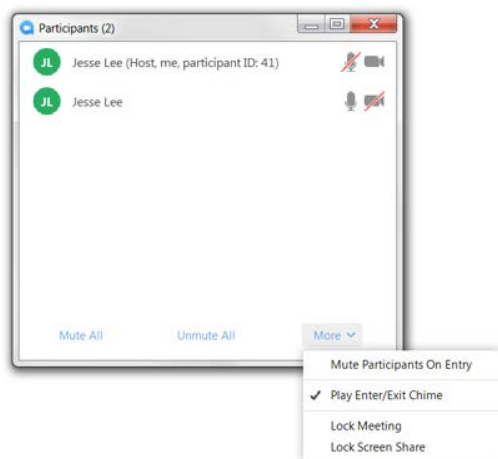
The main **Participants** panel (shown above) lists all the participants currently in the meeting, displays whether they are currently muted or sending video, and contains a range of configuration options.

The following options control the meeting as a whole.

- **Mute All/Unmute All** - Mutes or unmutes all participants in meeting. When selecting this option, you will see a further checkbox that you can set to either allow or not allow participants to unmute.
- A **More** button that includes the following further configuration options:
    - **Mute Participants On Entry** - Participants will automatically be muted as they enter the meeting.
    - **Put Attendee in Waiting Room on Entry** - When joining a meeting, participants are put in a waiting room and you must explicitly admit them to the meeting.
        - You must have **Waiting Room** selected in your **Advanced Settings** prior to starting the meeting, as described in 10.5, Advanced Options.
    - **Play Enter/Exit Chime** - Plays a sound as participants join and leave the meeting.

- **Lock meeting** - Locks the meeting so that no other participants may join
- **Lock screen share** - Prevents anyone apart from the host from sharing their screen.

The following options apply to individual participants.

Note: Although all available configuration options are described below, the options shown on your screen may vary based on what features are enabled for this meeting.
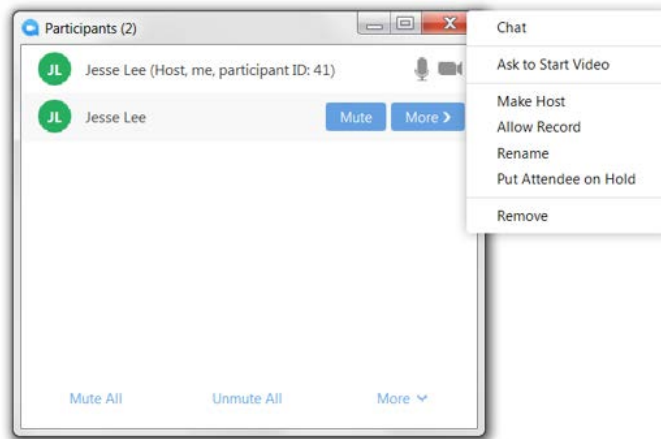
Hover your cursor over a specific participant to see all or some of the following options.

- **Stop/Ask to Start Video** - Stops a participant's video stream or sends them a request to start their video.

- **Make Host** - Grants another participant permission to be the host of the meeting - the original host of the meeting can subsequently use a **Reclaim Host** option to become the host of the meeting again.

- **Make Co-host** - Makes a participant a Co-host. You can promote multiple participants to be co-hosts. Co-hosts will see most of the configuration options available to a meeting host, as follows. Note that a Co-host cannot end the meeting or make another participant the host of the meeting.

  - **Mute All/Unmute All** - Mutes or unmutes all participants in meeting. When selecting this option, you will see a further checkbox that you can set to either allow or not allow individual participants to unmute themselves.
  - **Mute Participants On Entry** - Mutes participants automatically as they enter the meeting.
  - **Play Enter/Exit Chime** - Plays a sound as participants join and leave the meeting.
  - **Lock meeting** - Locks the meeting so that no other participants may join
  - **Lock Screen Share** - Stops other participants sharing their screens.
  - **Stop Video** - Stops a participant's video stream (unable to start video).
  - **Remove** - Forces a participant to leave the meeting.
  - **Rename** - Renames the participant's name selection.

- **Put attendee on hold** - Places the participant on-hold, removing them from the video and audio conference
  - You must have configured **Allow host attendee on-hold** selected in your **Advanced Settings** prior to starting the meeting, as described in 10.5.3, In Meeting Advanced Settings.
- **Allow Record** - Allows other participants to record the meeting, as described in 8, Recording Your Meeting.
- **Remove** - Forces participant(s) to leave the meeting
- **Rename** - Renames the participant's name selection
- **Put attendee on hold** - Places the participant on-hold, removing them from the video and audio conference
  - You must have **Allow host to put attendee on-hold** selected in your **Advanced Settings** prior to starting the meeting, as described in 10.5.3, In Meeting Advanced Settings.

9.2   Managing Video Breakout Rooms

Video Breakout Rooms allow a meeting host to split a Meeting into up to 50 separate sessions, for example a meeting could be split to allow separate groups to work on different topics and later return to the main meeting. Breakout session participants have full audio, video and screen share capabilities.

The meeting host can choose to split the participants of the meeting into these separate sessions automatically or manually and can switch between sessions at any time. A meeting host can create up to 50 breakout sessions, with a maximum of 200 participants in a session (if you have the Large Meeting 200 add-on license).

Breakout rooms must be enabled in the **In Meeting (Advanced)** settings, described in 10.5.3, In Meeting Advanced Settings. Note that this setting can only be enabled if you have disabled Remote support (where the Meeting host can request remote control of another participant's device).

9.2.1   Creating Video Breakout Rooms

Once you have started your Meeting, you can create a Breakout Room by clicking on the in the lower menu bar.

1.   Use the pop-up to select the number of sessions you would like to create, and how you would like to assign your participants to those sessions.

   • **Automatically**: Let Meeting split your participants up evenly into each of the sessions.

   • **Manually**: Choose which participants you would like in each session.
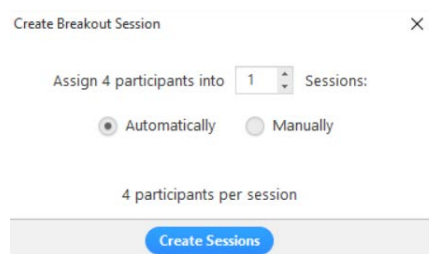
2.   Click **Create Sessions**. Your sessions will be created but will not start automatically. Once you have created your sessions, you can manage the sessions prior to starting them, as described below.

9.2.2   Assigning Participants to a Session

To assign participants to your Breakout Sessions:

1.   Select **Assign** next to the session to which you wish to assign participants.

2.   Select the checkbox next to each participant you wish to assign to that session.

3.   Repeat this for each breakout session.

Once a participant has been assigned (manually or automatically), the number of participants will show in place of the **Assign** button.
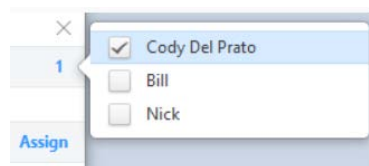
9.2.3   Preparing Breakout Sessions

If you selected to assign participants to sessions **Automatically**, your sessions will appear with the participants assigned evenly across your sessions. If you chose to assign participants **Manually** or wish to make changes, you can do so before starting the sessions. Participants who are not assigned to breakout sessions will remain in the main meeting when the sessions are started.
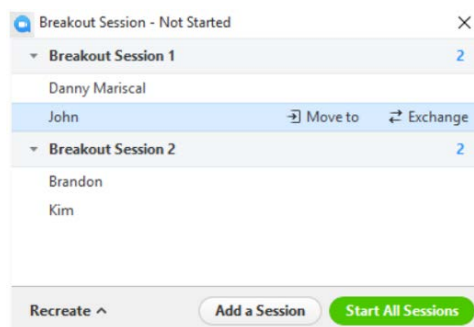
You can use the following options on the **Breakout Sessions** screen before starting the sessions.

- **Move to** (participant) - Select the session to which you wish to move the participant.
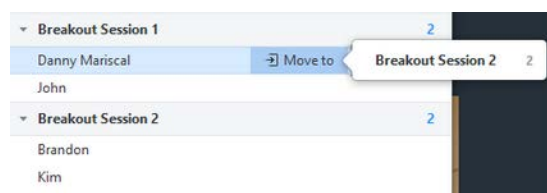
- **Exchange** (participant) - Select a participant in another session to swap the selected participant with.
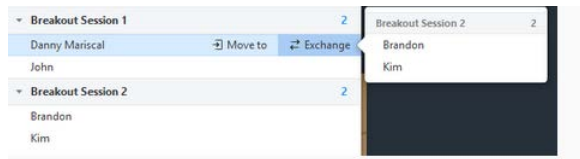
- **Delete Session** - Deletes the selected session.
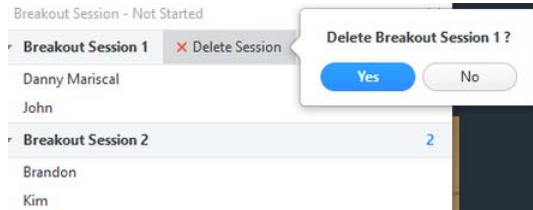
- **Recreate** - Starts the Breakout Session creation from scratch.

- **Add a Session** - Adds another Breakout Session.

- **Start All Sessions** - Starts the Breakout Session.

  - All participants will be moved to their respective sessions after confirming the prompt to join the Breakout Session. The host will be left in the main meeting until manually joining one of the sessions. The participants (and the host when manually joining a session) will see the message shown below when being moved to the Breakout Session.
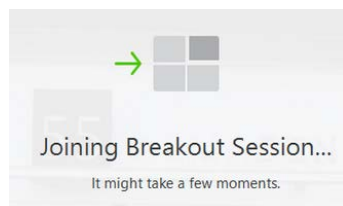
9.2.4   Managing Breakout Session – In Progress
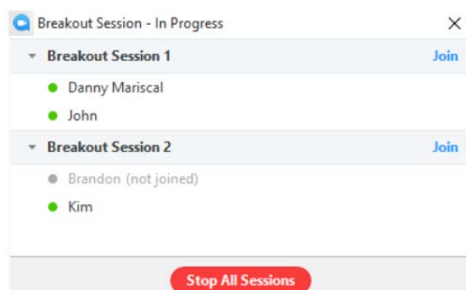
Once the Breakout Sessions have been started, the participants will be asked to join the Breakout Session to which they have been assigned. The host will stay in the main meeting until joining a session manually. If a participant has not yet joined the session, you will see **(not joined)** next to their name.

The host has the following options while the Breakout Sessions are in progress:

- **Join** (session) - Allows the host to join the breakout session selected

- **Leave** (session) - Allows the host to leave the session and return to the main meeting (only shows when in a Breakout Session)

- **Stop All Sessions** - Stops all sessions after a 30 second countdown, shown to the host and participants, and returns all participants back to the main meeting.

- The host can also rename any sessions, broadcast a message to all sessions, and move users between sessions using the options described in 9.2.3.

9.2.5   Ask for Help

Participants in the Breakout Sessions can request that the meeting host join their meeting by pressing the **Ask for Help** button ![Ask for Help] in the Meeting menu bar.

The meeting host will be prompted to join the session from which the request originated by clicking **Join Breakout Session** to join the session.
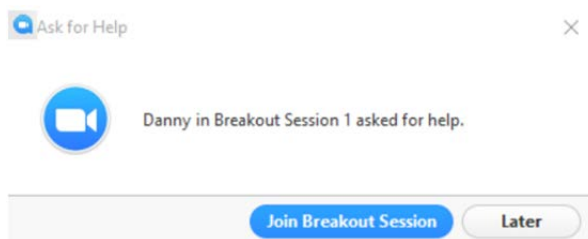
9.3   Closed Captions

Closed captions allow the host or a participant assigned by the host to type closed captions for the meeting for meeting participants that are hearing impaired.

You must enable Closed captions in the In Meeting (Advanced) user settings, as described in 10.5.3, In Meeting Advanced Settings.

To use closed captions while in a meeting:

1. Press ![Closed Caption], the **Closed Caption** button in the menu bar.

2. You should then either click on **I will type** to type the captioning yourself or assign another participant in the meeting to do so by clicking **Open Manage participants**.
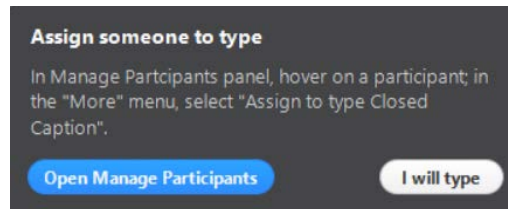
3. You can then right click on a participant in the Participants Panel and select **Assign to type Closed Caption**.

4. Participants will then receive a **Closed Caption is available** notification in their menu bar.
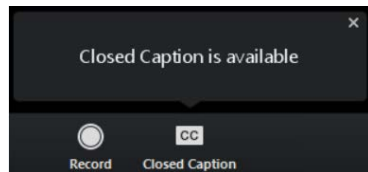
5. After receiving the notification, a participant clicking on the **Closed Caption** button will see the closed captions as they are entered into the **Closed Captions** panel.

9.4   Polls

Polls allow the host to compile questionnaires for participants to complete during a Meeting.

You must enable Polling in the In Meeting (Advanced) user settings, as described in 10.5, Advanced Options.

- To create a poll for an upcoming meeting, press , the **Polls** button in the menu bar.

- You will then see a pop-up where you can compile your poll.

- You can add a title for the poll and create a number of questions that have either single choice or multiple choice responses.

- Once you have created the poll, click **Save**.

- You will then see a screen where you can assign the poll to a specific meeting.

- When you want to start the poll, click [Polls icon]. You will then see your poll and can click the **Launch Polling** button.

- You will then see the results as participants respond to the poll.

- Click **End Polling** when you want to stop the poll.

- Click **Share Results** to display the results with the other participants.

- Click **Re-launch Polling** if you want participants to continue to respond to the poll.

- To close the **Polls** pop-up, click the x in the top right corner.

10   Meeting Settings

You can use options on the Meeting UI to customize the client to best suit your preferences. This section describes how to do this.

10.1   Changing your name and profile picture

Depending on the configuration of your client, you may be able to change the name and profile picture used by the Standalone Meeting client.

10.1.1 Changing the account name

You may be able to change the account name used for MaX Meeting, although some deployment configurations do not allow you to change it.

To view and change your account name:

- On the Meeting UI, select **Tools->View Account**.

- If you are able to edit it, your current account name will appear in an editable box.
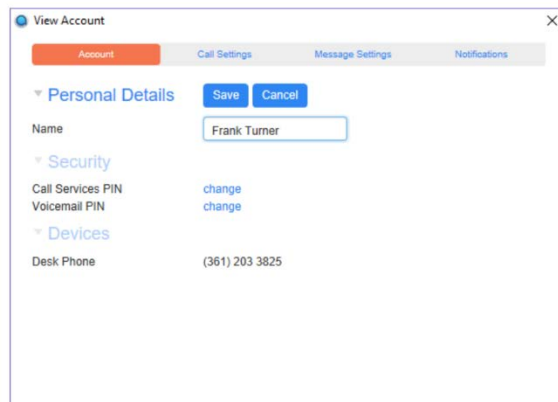
- Type the new name and press **Save**.

You can also change your display name when you are in a Meeting, which will change it for that meeting only. This can be done even if you cannot change the account name.

- When in a Meeting, select the **Participants** panel.

- Mouse over your name, and then click the **Rename** button that appears.

- In the pop-up box that appears, type the new screen name and click **OK**.
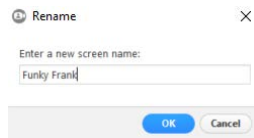
- The other participants in the Meeting will now see your new name.

10.1.2 Changing the profile picture

The MaX Meeting client displays a profile picture, or avatar, alongside your name in the Meeting UI.

You may be able to change this picture. However, note that if you already have an avatar in the Meeting client, following these instructions to change the picture will not work and the picture will be overwritten by the existing avatar the next time your Meeting client syncs with the server.

To change the avatar:

1. Ensure you have a suitable image in jpg/jpeg, gif, or png format that is smaller than 2MB.

2. Click on the avatar in the top-right corner of the screen to launch the **Change Picture UI**.
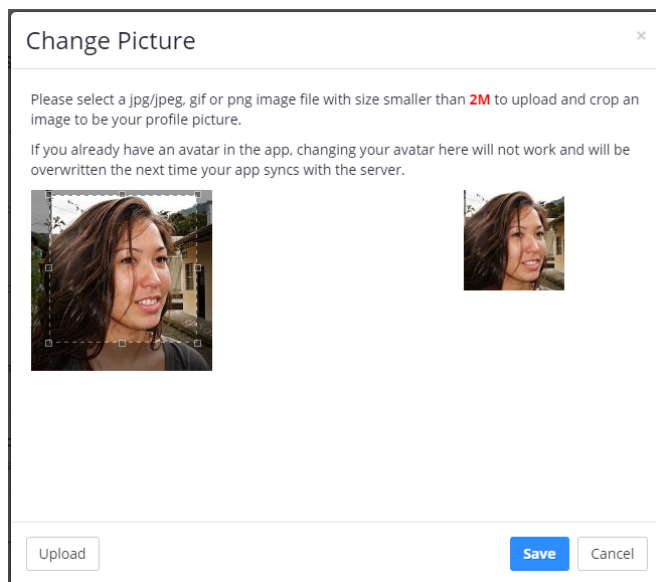
3. Click upload and select the image you want to use.

4. Your image will now appear in both boxes.

   - The image on the right shows you how the profile picture will look in the UI.

   - Use the crop feature on the left-hand box if you want to change how much of the picture will be used.

5. Once you are happy with the picture, click **Save**. The Meeting client will now use this as your display picture.

10.2 Accessing and using the Meeting Settings screens

MaX Meeting has a number of settings screens that allow you to view and change the default options for Meeting client and test your audio and video equipment**.**

To access these settings, click **Tools** in the top menu on the main Meeting screen.
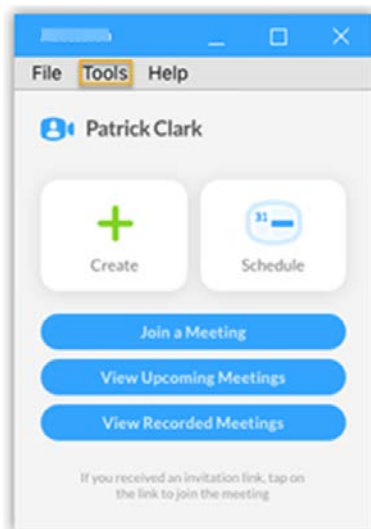
- Select **Options**, and then click on the type of setting you want to view or change.
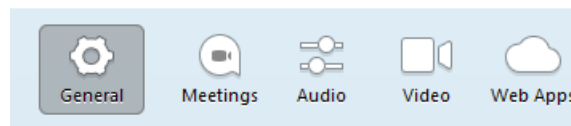
- Use the **General** section to control how the Meeting client starts up and operates.

- Use the **Meetings** section to fine-tune Meeting settings and default behavior.

- Use the **Audio** and **Video** screen to test that your headset or microphone and speakers are operating correctly.

- You may be able to see a **Web Apps** tab that allows you to select which apps appear on the Tools menu.

This rest of this section describes the settings available on the **General** and **Meetings** screens.

10.3 General Settings

Click **Tools->Options->General** to access the panel that allows you to configure general settings for the Meeting application.
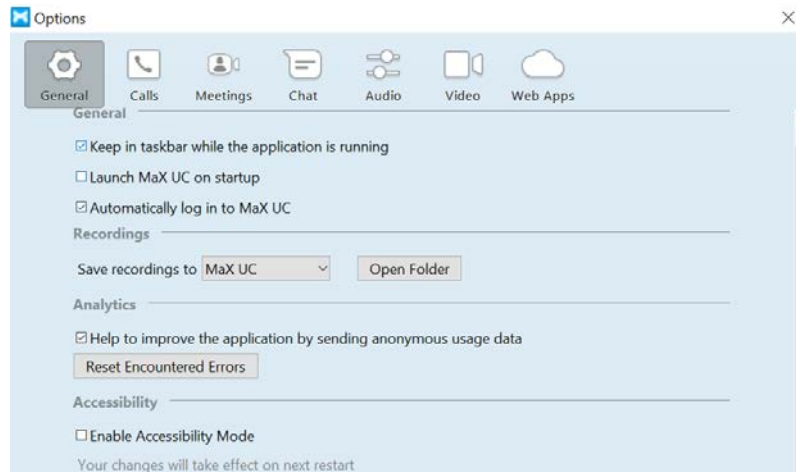
- Use the check boxes and drop-down option to make any changes.

- Restart the Meeting client so that these changes come into effect.

10.4 Meeting Settings

Click **Tools->Options->Meeting** to view the default settings for MaX Meetings. All the options described below are viewable on the same screen.

10.4.1 Join Settings

The settings on the **Join** panel control how you will connect to meetings.
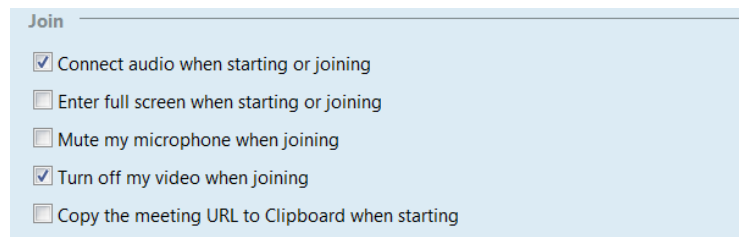
Tick the options that you want to use:

- **Connect to audio when starting or joining** – Whether or not you will always be connected to audio via your computer whenever you start or join a meeting.

- **Enter full screen when starting or joining** – Whether or not you will always enter meetings in full screen mode. You can exit full at any time by pressing the **Esc** key on your keyboard.

- **Mute my microphone when joining** - Whether or not you will always enter a meeting with your microphone on mute. To unmute, you can either click on the mute button on the Meeting menu bar located at bottom of your screen or press **Alt + a** on your keyboard.

- **Turn off my video when joining** - Whether or not you will always enter a meeting with your video disabled. To enable your video, simply press the **Start Video** button located at the bottom left of the Meeting menu bar.

- **Copy the meeting URL to the Clipboard when starting** - Whether or not the meeting URL will always be copied to the clipboard. When enabled, you can then paste this URL into an email or IM to invite others to the current meeting.

10.4.2 Invites

The settings on the **Invites** panel cover email invitations.
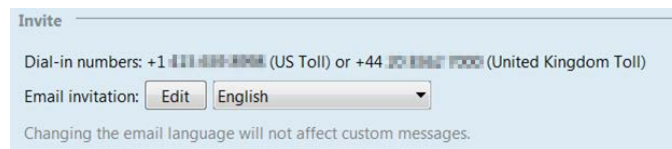
- The Dial-in numbers are used by participants to dial into Meetings. These are set by your service provider and you cannot change them.

- The **Edit** button alongside **Email Invitation** allows you to edit the standard email that is sent to meeting participants.
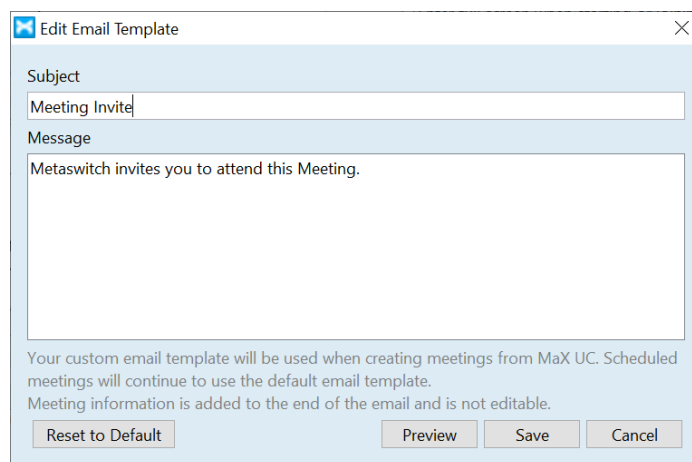
- You can modify the email Subject as well as the body of the email message. NOTE: The actual meeting information is added to the end of the email message and is not editable.

- **Email Invitation Language** – Use the language dropdown list to select the language to be used in the invite.
  NOTE: If you customize the email message, it will only be show in the language in which it was written.

- **Preview** - Shows you an example of what your email invitations will look like to participants.

- **Save** - Saves any changes you have made to the email template.

- **Cancel** - Cancels any changes made to the email template.

- **Reset to Default** - Removes any changes you have made and restores the default invitation email text.

10.4.3 Meeting Settings

The settings on the **Meeting** panel control how specific meeting items will operate.
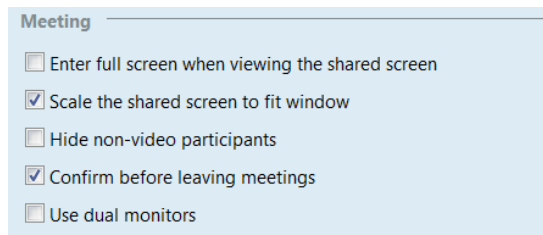
- **Enter full screen when viewing the shared screen** – Controls whether or not you will always be placed into full screen mode when viewing another's shared screen.

- **Scale the shared screen to fit the window** – Controls whether or not the shared screen will always be sized to fit the current viewing area.

- **Hide non-video participants** - Controls whether or not all dialing users will be shown in the video gallery. When non-video participants are hidden, you will still be able to hear their audio and see them in the **Participants** panel.

- **Confirm before leaving meeting** - Controls whether or not the system will always confirm that you want to leave the meeting before allowing you to exit.

- **Use Dual Monitors** - Controls whether or not the system will allow you to select a second monitor screen to be shared during the meeting. If you set this option, you must be extra careful when sharing your screen during a meeting to ensure that you have nothing open on either of your monitors that you do not wish to share.

10.4.4 Download Outlook Plugin

This option allows you to download and install the Outlook plugin that allows you to schedule Meeting directly from your Outlook calendar, as described in 2.1.1, Downloading and Installing the Outlook Calendar Plugin.

10.5 Advanced Options

You can carry out a more granular customization of your Meeting experience by clicking the **Advanced Settings** button on the **Tools->Options->Meetings** screen on the Meeting UI.

The **Advanced Settings** page has three tabs:

- **Meeting**, described in the following sections:

    - 10.5.1, Schedule Meeting

    - 10.5.2, In Meeting (Basic)

    - 10.5.3, In Meeting Advanced Settings

- **Recording**, described in 10.5.4, Recording Settings

- **Telephone**, described in 10.5.5, Telephone

As described in the rest of this chapter, the **My Settings** page displays each of your current settings, using a slider to indicate whether a setting is enabled or not.
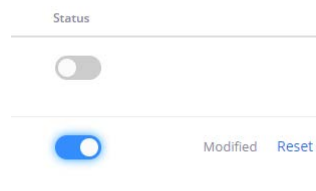
- To change a setting, mouse over and move the slider. You will briefly see a green pop-up noting that the setting has changed, although this only appears for a few seconds.

- The UI then displays that this setting has been **Modified**.

- If you change your mind, select **Reset**. You will see a pop-up advising you of the effect of resetting. Click **Reset** to change the setting back to its original value or **Cancel** to leave the setting as it is.

- You cannot change a setting that has been grayed out. For example, some settings may be locked by your telephone system administration.

10.5.1 Schedule Meeting

Use this section to modify the options that are used by default when you schedule a Meeting.

Schedule Meeting

Features

Host video
Start meetings with host video on

Participants video
Start meetings with participant video on. Participants can change this during the meeting.

Audio Type
Determine how participants can join the audio portion of the meeting. When joining audio, you can let them choose to use their computer microphone/speaker or use a telephone. You can also limit them to just one of those audio types. If you have 3rd party audio enabled, you can require that all partipants follow the instructions you provide for using non-Meeting audio.

- ● Telephone and Computer Audio
- ○ Telephone
- ○ Computer Audio

Join before host
Allow participants to join the meeting before the host arrives

Require a password for Personal Meetings if attendees can join before host
If the meeting organizer selects the "Enable join before host" option for a Personal Meeting, the "Require meeting password" option is also enabled. This prevents unauthorized participants from fraudulently using the meeting ID.

Generate and require password for participants joining by phone
Will generate and send new passwords for newly scheduled or edited meetings.

Mute participants automatically
Automatically mute all participants when they initially join the meeting. The host controls whether they can later unmute themselves.

Upcoming meeting reminder
Receive desktop notification for upcoming meetings. Reminder time can be configured in the Meeting Desktop Client.

For more information on these options, see 3.1.1, Scheduling a Meeting from the Meeting Client.

10.5.2 In Meeting (Basic)

Use this section to modify basic features used when you are in a Meeting. As noted, some of these features may not be visible if they have not been enabled on your system or be grayed out if you cannot change the setting.

In Meeting (Basic)

End-to-end encryption
Require that all meetings are encrypted using AES

Chat
Allow meeting participants to send a message visible to all participants

Private chat
Allow meeting participants to send a private 1:1 message to another participant.

Auto saving chats
Automatically save all in-meeting chats so that hosts do not need to manually save the text of the chat after the meeting starts.

Play sound when participants join or leave
Play sound when participants join or leave

Co-host
Allow the host to add co-hosts. Co-hosts have the same in-meeting controls as the host.

Polling
Add 'Polls' to the meeting controls. This allows the host to survey the attendees.

Allow host to put attendee on hold
Allow hosts to temporarily remove an attendee from the meeting.

Annotation
Allow participants to use annotation tools to add information to shared screens

Remote control
During screen sharing, the person who is sharing can allow others to control the shared content

Nonverbal feedback
Participants in a meeting can provide nonverbal feedback and express opinions by clicking on icons in the Participants panel.

- **End-to-end encryption** - requires all meetings to be encrypted. Users can dial into a meeting from the PSTN and the security of the connection depends on whether users have enabled End-to-end encryption. This function is enabled by default.

    - If users enable End-to-end encryption, all traffic is encrypted as follows.

        - Signaling uses SIPS (i.e. SIP over TLS).

        - Media uses AES 256 encryption.

        When End-to-end encryption is enabled, devices that cannot support SIPS and AES 256 encryption are not allowed to dial into meetings.

    - If users do not enable End-to-end encryption, all traffic (both signaling and media) is unencrypted.

- **Chat** – Enables the Meeting chat to everyone function. This function is enabled by default.

- **Private chat** - Enables the Meeting participants to send private chat messages to an individual participant. This function is enabled by default.

- **Auto saving chats** – Automatically saves your chat logs from all meetings to the same location as your meeting recordings.

- **Play sound on join/leave** – Enables you to set a chime that is played anytime a participant enters or exits the meeting. You can also choose if only you hear the chime, or if everyone in the meeting will hear the chime.

- **Co-host** – Enables the Meeting host to make one or more participant a Co-host. See section 9.1 for more information on Co-host functions. You will only see this option if it has been enabled on your system.

- **Polling** - Enables the Meeting host to create polls to be used during meetings.

- **Allow host to put attendee on hold** – Enables the meeting host to place a participant on hold. When placed on hold the participant's video is stopped and they are muted. Other participants will see that user's avatar, if present, and that they are muted. The person on hold will see **You are on hold** on their screen and will have no control in their client until they are taken off hold. You will only see this option if it has been enabled on your system.

- **Annotation** - Enables participants to use annotation when screen sharing.

- **Remote control** - During screen sharing, the person who is sharing can allow others to control the shared content.

- **Nonverbal feedback** - participants in a meeting can give non-verbal feedback by clicking icons on the participants' panel.

10.5.3 In Meeting Advanced Settings

Use this section to modify advanced features used when in a meeting.

In Meeting (Advanced)

Breakout room
Allow host to split meeting participants into separate, smaller rooms

Remote support
Allow meeting host to provide 1:1 remote support to another participant

Closed captioning
Allow host to type closed captions or assign a participant/third party device to add closed captions

☑ Allow participants to save closed captions.

Far end camera control
Allow another user to take control of your camera during a meeting

Group HD video
Activate higher quality video for host and participants. (This will use more bandwidth.)

Screen sharing
Allow host and participants to share their screen or content during meetings

Attention tracking
Lets the host see an indicator in the participant panel if a meeting/webinar attendee does not have Meeting in focus during screen sharing.

Waiting room
Attendees cannot join a meeting until a host admits them individually from the waiting room. If Waiting room is enabled, the option for attendees to join the meeting before the host arrives is automatically disabled.

Customize the title, logo, and description ✏️

Show a "Join from your browser" link
Allow participants to bypass the Meeting application download process, and join a meeting directly from their browser. This is a workaround for participants who are unable to download, install, or run applications. Note that the meeting experience from the browser is limited

Invitation Email
Your meeting attendees will receive emails in language based upon their browser/profile settings. Choose languages which your expected attendees will receive content in to edit.

Choose email in language to edit   English ▼   ✏️

Personal Meeting ID

116-2544-8937
https://metaswitchemea.accessionmeeting.com/j/11625448937

Personal Link

Not set yet.

- **Breakout room** – Enables Breakout rooms. For more information, see section 9.2. This option will be grayed out if you have **Remote support** enabled.

- **Remote support** - Allows the Meeting host to take control of a participant's device. Note that you cannot enable this and the Breakout room option.

- **Closed caption** – Allows the host or an assigned meeting participant to type closed captions. For more information, see section 9.3.

- **Far end camera control** - Allows another meeting participant to take control of your camera and use the Pan-Tilt-Zoom (PTZ) functionality of the camera. The webcam must have these features for this to work. The host of the meeting is the only user that can request far end camera control.

- **Group HD video** - Enables HD video.

- **Screen sharing** - Allows host and participant to share screens during the meeting

- **Attention tracking** - Allows the Meeting host to see whether participants have Meeting in focus when someone is sharing their screen.

- **Waiting Room** - When enabled, all participants are placed in a waiting room when joining a Meeting, and the host must explicitly admit them to the Meeting. You can customize the UI that is shown when participants enter the Waiting room.

- **Show a "join from your browser" link** - Allows participants who do not have Meeting to join a Meeting directly from a browser, rather than having to download a client.

- **Invitation Email** - Use the drop-down to select the language that will be used for email invitations and click the Edit symbol to change the format and content of the email invitation.

- **Personal Meeting ID** - The Personal Meeting ID (PMID) that you can choose to use for scheduled Meetings, rather than the one randomly generated when you schedule a meeting.

  - Click **Edit** if you want to change it.

  - Your new PMID must not exceed 11 characters, and must begin with 115, 116, 13, 15 or 18.

- **Personal Link** - The Personal Link (PL) that you can send to participants so that they can simply type this in a browser to join a scheduled Meeting that is using your Personal Meeting ID.

  - Click **Customize** if you want to create or change it.

Changing your Personal Meeting ID and/or Personal Link will change this on any scheduled meetings that used the previous PMID or PL. If participants use the previous PMID or PL to join a meeting, they will not be able to access it. For example, this will affect someone who tries to use the PMID or PL in an invitation that you sent prior to making the change.

10.5.4 Recording Settings

Use this section to enable or disable local and automatic recording of Meetings.

Recording   ☑ Local recording
                     ☐ Automatic recording

                     [Save Changes] [Cancel]

- **Local recording** - Controls whether or not participants can make local recordings of meetings.

- **Automatic recording** - Controls whether or not all Meetings are automatically recorded.

10.5.5 Telephone

Use the Telephone tab to specify how international phone numbers are displayed in meeting invitations.
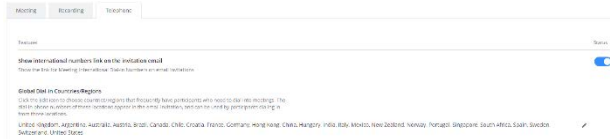
- **Show international numbers** - Controls whether or not to show the link for international dial-in numbers on email invitations.

- **Global Dial-in Countries/Regions** - Allows you to specify which international numbers appear in email invitations, and in which order. Click the Edit symbol to make changes to this.

A   Supported SIP/H.323 Conference Room Systems

A.1   Polycom Room Systems Supported:

- VSX 7000*, 7000e*, 8000

- Group Series

- HDX 6000 series

- HDX 7000 series

- HDX 8000 series

- HDX 9000 series

- RMX 2000 MCU (MPMx cards)

*Software version 7.5 or higher

A.2   LifeSize Room Systems Supported:

Icon 600, 800

Express 220

Team 220

Room 220, 220i

A.3   Cisco/Tandberg Room Systems Supported:

Cisco SX10 and SX20

Cisco C20, C20 Plus, C40, C60, C90

Tandberg 880 MXP

Tandberg 6000 MXP

A.4 TelyHD Room Systems Supported:

Tely 200

TelyHD Pro

A.5 Aver Room Systems Supported:

EVC 900, 130, 130P, 100

A.6 Huawei Room Systems Supported:

VP9030, VP9050 and TE30