

# Feature User Guide



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## 1 Description

Meeting Webinar provides a full featured webinar product offered as a service hosted entirely from the cloud. It includes registration of attendees with custom questions, attendee lists, Q&A, polling, and a chat facility for attendees.

Meeting Webinar support multiple hosts and up to 100 panelists (including hosts).

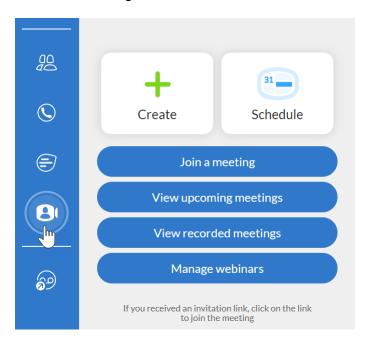
You must have an add-on license to your Meeting product that allows you to set up Meeting Webinars. Depending on the capacity of your license, you may be able to broadcast a webinar to up to 1,000 view-only attendees.

This document describes how to use Meeting Webinar.

# 2 Meeting Webinars

To access the Meeting Webinars UI:

- Open your MaX UC Desktop client.
- 2. Select the Meetings tab.
- 3. Select Manage Webinars.

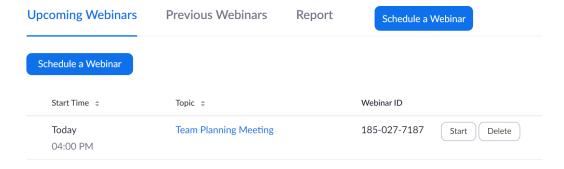


You can then see the **My Webinars** page shown in section 3, Create a Webinar, where you can schedule, manage, and generate reports on your webinars.

## 3 Create a Webinar

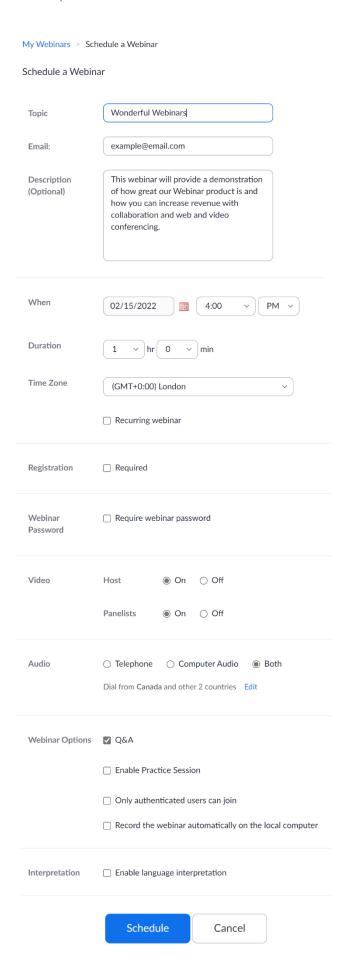
To create a new webinar:

- Select the Manage Webinars link in MaX UC Desktop, as shown in Section 2, Meeting Webinars.
- 2. Select the Schedule a Webinar tab.



3. Select the Schedule a Webinar button.

You can now see the My Webinars page.



Enter the following information about your Webinar:

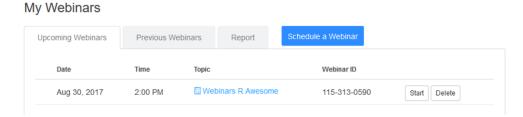
- 1. Enter the **Topic** of your webinar.
- 2. Enter the host **Email** address (your email).
- 3. If required, enter a **Description** for the Webinar.
- 4. Use the entry fields alongside **When** to select the date and start time of your Webinar.
- 5. Select the **Duration** of your Webinar.
- 6. Select the **Time Zone** of your Webinar.
- 7. Select whether your Webinar requires **Registration**.
- 8. Select if you want **Host Video** On or Off when the host joins the Webinar.
- 9. Select if you want your **Panelists Video** On or Off when the panelists join the Webinar.
- 10. Select the audio options you want to allow:
  - Telephone (Dial-in) Only
  - Computer Audio (VoIP)
  - Both Telephone (Dial-in) and Computer Audio (VoIP)
- 11. Select the Webinar Options checkboxes to allow:
  - Q&A for the Webinar. If disabled, attendees do not see the Q&A tab during the webinar.
  - A Practice Session. When selected, you and your panelists can get set up and familiarize yourselves with the Meeting Webinar controls before your Webinar starts.
  - Only authenticated users can join.
  - Record the webinar automatically on the local computer.
- 12. Select the **Schedule** button at the bottom of the page to schedule the webinar. Once the webinar is scheduled, you can create a custom invitation to attendees, assign panelists, configure registration rules, and much more, as described in Section 4, Manage your Webinar.

## 4 Manage your Webinar

Once you have created your webinar, as described in Section 3, Create a Webinar, you must configure the management options available for your webinar, including inviting attendees, setting registration options, and more.

To manage your webinar:

- 1. Go to the My Webinars screen.
- 2. On the **Upcoming Webinars** tab, click the **Topic** link to open the webinar you want to manage.

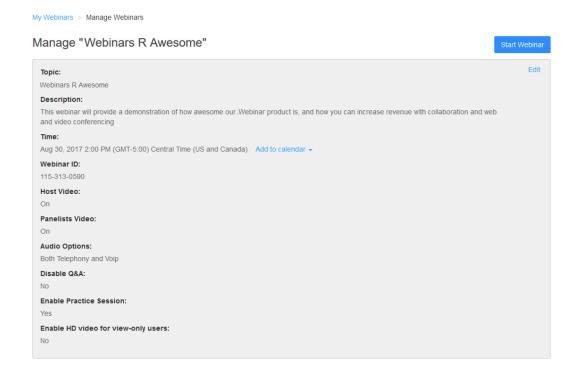


The **Manage Webinars** screen that appears has several panels where you can configure a range of settings for this webinar, as described in the rest of this section.

### 4.1 Manage Webinar basic settings

The first panel allows you to change the basic settings that you set up when creating the webinar.

If you need to make any changes, click the *Edit* link located at the top right of the Manage Webinars screen. If you need any background on these settings, see section 3. Create a Webinar.



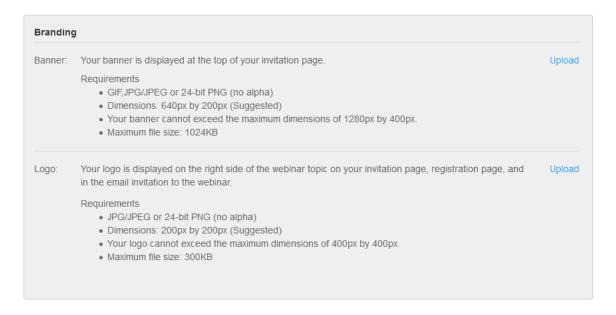
### 4.2 Brand your Webinar invite

You can customize the email invitation that is sent to the people you are inviting to your Meeting Webinar by adding a customer banner or logo.

To add a banner or logo to your webinar invite:

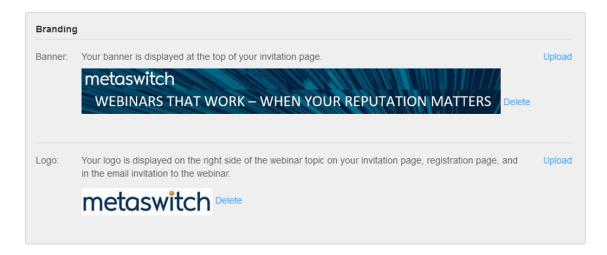
1. Scroll down the Manage Webinars screen to the **Branding** section.

This screen sets out the required format for the banner image and logo files. You must have these files saved on your computer ready to upload them.



- To add a banner to your email invitation, click on the *Upload* link in the **Banner** section.
- 3. To add a logo to your email invitation, click on the *Upload* link in the **Logo** section.

Once you have uploaded the image for your banner and/or logo, you can see a preview of the image(s) used in your email invitation.



#### 4.3 Invite Panelists

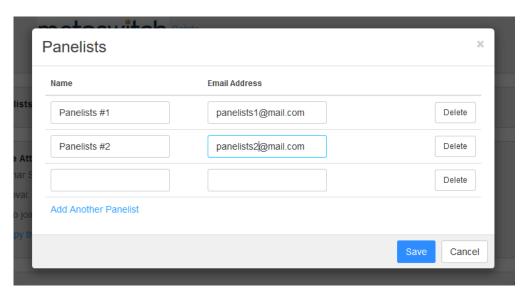
You can have up to 100 Panelists in your webinar. This total includes the Host and any Co-Hosts.

#### To add Panelists to your webinar:

1. Scroll down the Manage Webinars screen to the **Panelists** section.



- 2. Click the Edit link.
- 3. The **Add Panelists** interface panel appears.



- 4. Enter each panelist's Name and E-mail Address.
- 5. Click *Add Another Panelist* if you need to add further panelists.
  - You can add up to 100 panelists (including the host and any co-hosts).
  - You can delete or add panelists at any time before the Webinar starts.
- 6. Press Save to send invites to the new panelists entered.

## 4.4 Manage Attendees

Attendees are view-only participants who cannot share their video or audio during the webinar. Attendees see the active speaker view of the webinar and the screen share of the webinar if the screen is being shared. Attendees interact with the Hosts and Panelists using the Q&A and chat panels.

To invite Attendees to register or attend your webinar:

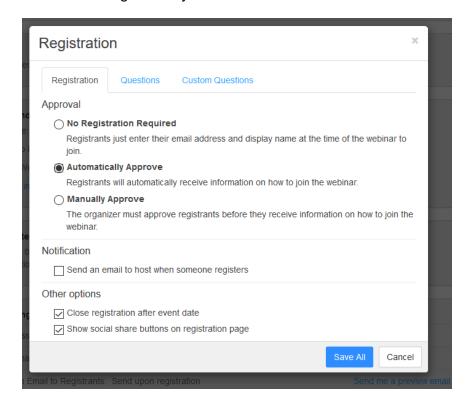
- Go to the Manage Webinars page.
- 2. Scroll down the page to the **Invite Attendees** section.



- 3. Click Edit.
- 4. You can then see the panel where you can carry out the steps described in the following sections.
  - 4.4.1, Registration types
  - 4.4.2, Registration Questions
  - 4.4.3, Send the invitation
  - 4.4.4, Manage registrations

#### 4.4.1 Registration types

You can choose from three approval methods on the Registration Panel when inviting attendees to register for your webinar:



- No Registration Required. Registrants simply enter their email address and display name when they join the webinar. This method is the simplest for the Attendees but allows you to capture only the email address and name of people attending the webinar.
- 2. **Automatically Approve**. Registrants automatically receive information on how to join the webinar after they enter any information you have required a registering attendee to provide. This method is useful when you want to capture specific information about attendees but allows anyone to register for the webinar. See Section 4.4.2 for the information you can capture during registration.
- 3. Manually Approve. The organizer must approve registrants before they receive information on how to join the webinar. This method is useful when you want to capture specific information about attendees and be selective about who you will allow to attend the webinar. See Section 4.4.2 for the information you can capture during registration.

From this panel you can also use the checkboxes to:

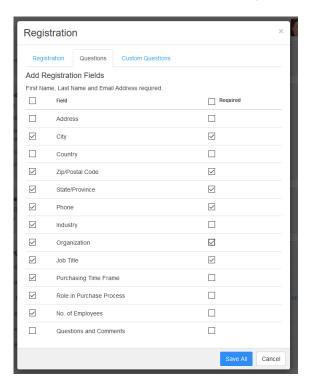
- send an email to the host when someone registers
- close registration after the event date
- show social share buttons on registration page.

#### 4.4.2 Registration Questions

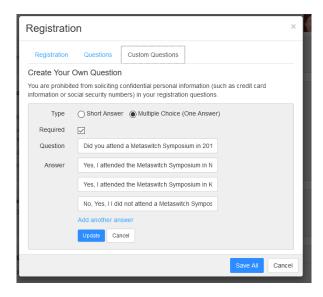
You can require that people registering for your webinar provide information before they can attend your webinar.

To manage the questions presented to attendees during registration:

1. Click on the **Questions** tab in the Registration Panel.



- 2. Use the checkboxes to choose the standard questions and select whether you require the attendee to enter specific information before they can register.
- 3. If you want to create custom questions, select the **Custom Questions** tab.



- 4. On this screen, you can either create questions that require a short answer from the attendee or present them with multiple choice options.
  - Enter the details for the first question.
  - If you want to add further questions, click Add another question.
  - Once you have entered all your questions, click Save All.

#### 4.4.3 Send the invitation

Once you have completed setting up the registration type and entering any questions you want attendees to answer when registering for your webinar, you see the Registration URL for this webinar on the **Invite Attendees** panel, as shown below.



To receive a copy of the webinar invitation email that is sent to attendees in your default mail client, click *Email me the invitation*.

#### 4.4.4 Manage registrations

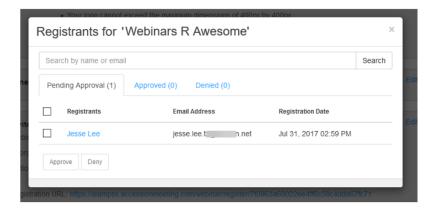
If you have chosen to manually approve registration in section 4.4.1, Registration types, you need to approve each registration request. If you selected *Send an email to host when someone registers*, you receive an email notification each time someone registers for the webinar.

To manage registrations:

- Go to the Manage Webinars page.
- Scroll down the page to the Manage Attendee section. In this section, you can see the number of Registrants and the number that you have already approved.



3. To manage the attendees, click the *Edit* link to open the registration management panel.

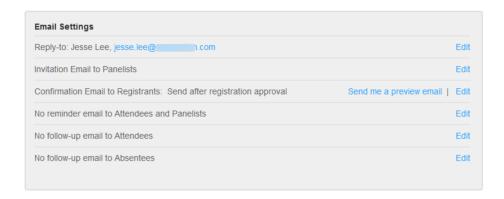


- Select the checkbox for each registrant that you want to manage and click either the Approve or Deny button.
- 2. Once you have approved the registration, the attendee receives an email with the link to join the meeting.
- If you need to change the registration status of a registrant that you have already approved or denied, you can change the registration by selecting the **Approved** or **Denied** tabs on the registration management panel.

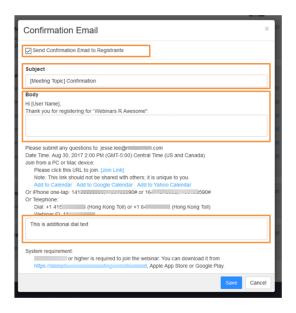
### 4.5 Reminder and follow-up Email Settings

You can set up Meeting Webinars to send reminders and follow-up emails automatically to your panelist and attendees.

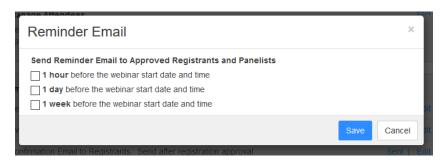
- Go to the Manage Webinars page.
- 2. Scroll down the page to the **Email Setting** section. This shows what you have currently configured and allows you to make changes.



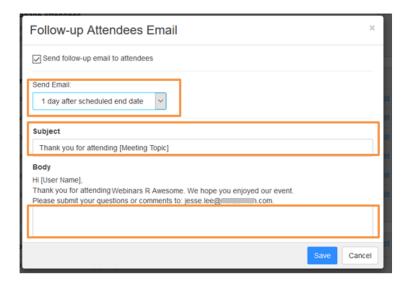
- 3. Click *Edit* to change any of the details on this screen.
  - By clicking Edit opposite Reply-to: you can change the name and email address of the reply to contact in the email invitations.
  - By clicking Edit opposite Invitation Email to Panelists you can select to send or not send an invitation email to your panelists.
  - By clicking Edit opposite Confirmation Email to Registrants you can modify the confirmation email received by attendees.



- In this panel, you can modify the email Subject as well as provide additional text for the Body of the email and dial-in section.
- By clicking Edit opposite Reminder email to Attendees and Panelists you
  can use the checkboxes to choose to send multiple reminder emails to those
  joining the webinar.



• By clicking *Edit* opposite **Follow-up Email to Attendees** you can choose to send an automatic follow-up email to everyone that attended your webinar.



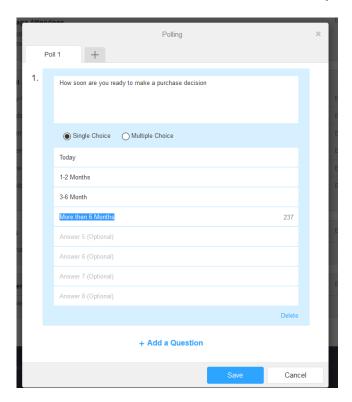
- You can use the **Send Email** dropdown to select to send the email between 1-7 days after your webinar.
- You can also customize the email subject and provide additional text in the body of the email.
- By clicking Edit opposite Follow-up Email to Absentees, you can choose to send an automatic follow-up email to everyone that registered for your webinar but did not attend.
  - You can use the **Send Email** dropdown to select to send the email between 1-7 days after your webinar.
  - You can also customize the email subject and provide additional text in the body of the email.

## 4.6 Create and manage polls

You can create and manage polls that are presented to your webinar attendees to capture information throughout your webinar.

To create a new poll for your webinar:

- 1. Go to the **Manage Webinars** page.
- 2. Scroll down the page to the **Polls** section and click *Edit*. This displays the **Polling** management panel.
- 3. Click on Add a Question and to see the Add a question panel



- 4. Enter your first question and answer(s).
- 5. To add further questions, click Add a Question.
- 6. Once you have added all the questions for this poll, click Save.
- 7. To add an additional Poll, click the + tab at the top of the page.

## 4.7 Attendees registering for the Webinar

When the attendees you have invited receive the invitation to register, they can click on the registration link to access the web-based registration page.



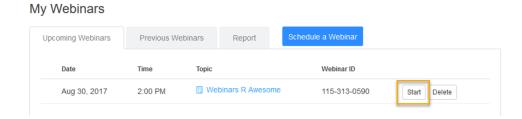
To register, the attendee clicks the *Register* button at the bottom of the screen.

Once the Attendee has registered and their registration has been automatically or manually approved, they receive an email with details on how to join the webinar.

## 5 Start your Webinar

To start a webinar:

- Go to the My Webinars page.
- 2. Select Start next to your webinar.



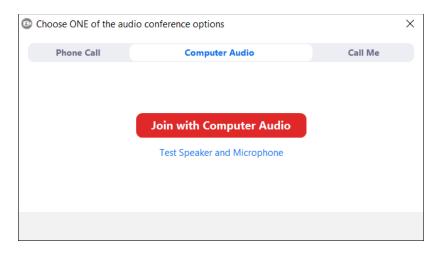
Note that Meeting Webinar uses your Meeting client for the webinar, so you have access to many of the functions used in Meeting.

### 5.1 Connect your audio

Note that Meeting Webinar uses your Meeting audio settings for your Webinar, so you do not need to change your audio settings. If you do need to change the setting or connection type, you can use the instructions in this section.

Although you can easily connect your computer audio to a Meeting, we recommend that you use an audio headset connected to your PC.

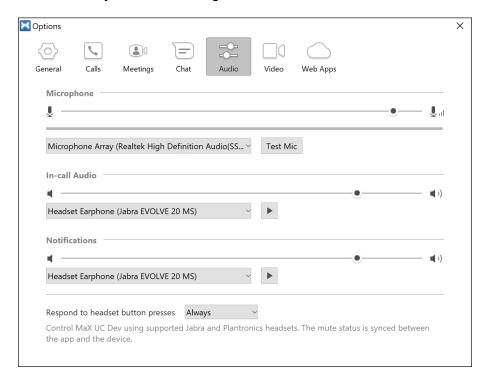
After joining or starting a Meeting, select *Join with Computer Audio* to connect your computer's speaker and microphone to the Meeting.



If you prefer to use your computer's speaker and microphone, you can set MaX UC Desktop to always connect your audio automatically via your computer. In the MaX UC Desktop UI:

- 1. Select your avatar and select Settings.
- 2. In the Options window that appears, select the Meetings tab.
- 3. Tick Connect Audio when starting or joining.

You can test your audio settings on the Audio tab.



- Use the dropdown list under **Microphone** to select the headset or device to transmit your voice.
- 2. Adjust the microphone volume using the sliding volume bar.

- 3. Use the *Test Mic* button to record a sample and play it back to check the quality of your headset microphone.
- 4. Use the dropdown list under **In-Call Audio** to select the headset or device to receive audio from your computer.
- 5. Adjust the headset/speaker volume using the sliding volume bar.
- 6. Verify your headset/speaker volume by pressing the *play* icon, which plays sound over your selected device.
- 7. Use the dropdown list under **Notifications** to select the device you want to ring and play other MaX UC Client notification sounds; this should be your PC sound device but can also be your headset.
- 8. Adjust the notification headset/speaker volume using the sliding volume bar.
- 9. Verify your notification headset/speaker volume by pressing the *play* icon, which plays sound over your selected device.

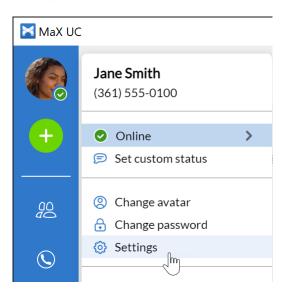
Once in the Webinar, you can mute/unmute by selecting the *mute* button on the bottom-left side of the menu bar. You can also mute/unmute by pressing **Alt** + **a** on your keyboard.

#### 5.2 Connect your video

Meeting Webinar uses your Meeting video settings for your Webinar, so you do not need to change your video settings. If you do need to change the setting or camera used, you can use the instructions in this section. Meeting supports video up to 720p with a refresh rate of 30 frames per second.

You can configure your video settings in both MaX UC Desktop and directly from the Meeting Webinar application.

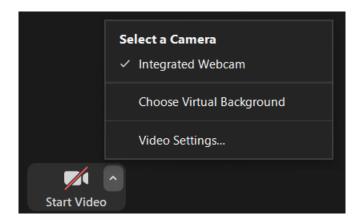
 To access your video setting from MaX UC Desktop, select your avatar and select Settings.



In the *Options* window that appears, select the *Video* tab. Use the *Camera* dropdown to select the preferred video device and display a sample of your video.



 To access your video settings from the Meeting client, expand the menu next to the Video icon and select Video Settings.



#### 5.2.1 Share your video in a Webinar

Note that only hosts and panelists can share video in a webinar.

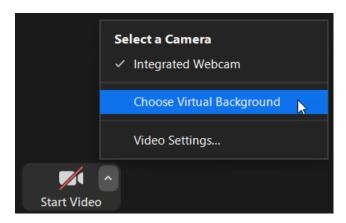
- To share your video while in a Meeting Webinar, click the Start Video icon located at the lower left of your screen.
- To stop sharing your video click the *Stop Video* icon located in the same place as the *Start Video* icon.

#### 5.2.2 Enable Virtual Backgrounds

You can choose a Virtual Background to disguise the surroundings in your video display and present a more professional workspace.

#### **MaX UC Desktop**

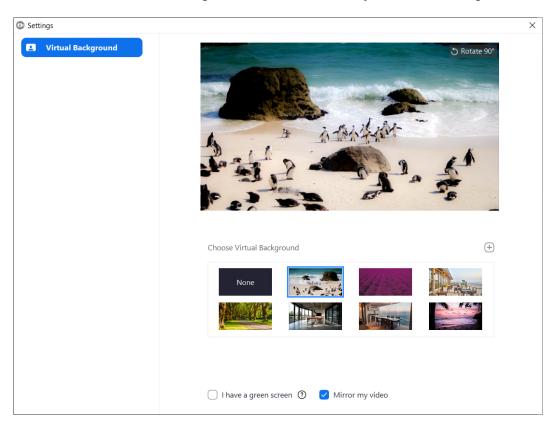
On MaX UC Desktop, expand the menu next to the video icon and select *Choose Virtual Background*.



If the Choose Virtual Background option is not visible, go to Video Settings > Meetings > Advanced Settings and, under the In Meeting (Advanced) heading, enable Virtual Background.

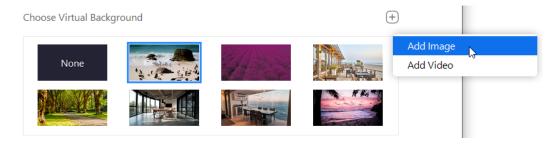
The Virtual Background window opens, and you can configure the following settings.

Click on one of the stock images or videos to set it as your Virtual Background.



The Virtual Background persists in subsequent Meetings.

- Select None in the Virtual Background window to turn off your Virtual Background.
- Click on the plus icon and select Add Image or Add Video to upload your own image or video to use as your Virtual Background.



- You can improve the quality of your Virtual Background by providing a green screen for your workspace. Tick the box next to I have a green screen if you have a green screen.
  - ☐ I have a green screen ② ☐ Mirror my video
- If you would like to flip your video horizontally, tick the box next to **Mirror my video**. Note that the video display is only mirrored on your screen and is not mirrored for other Meeting participants.

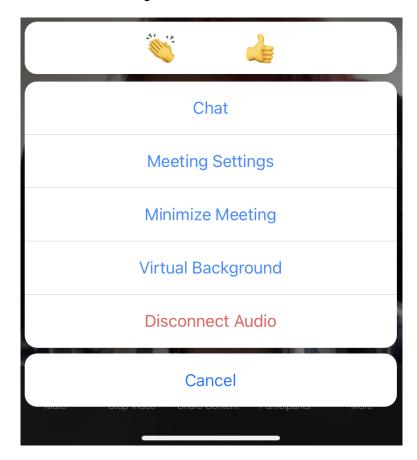
#### MaX UC Mobile (iOS)

Follow the instructions below to enable a Virtual Background for your video stream on MaX UC Mobile for iOS.

1. Tap on More.



2. Select Virtual Background.



The Virtual Background window opens, and you can configure the following settings.



- Tap on one of the stock images or videos to set it as your Virtual Background. The Virtual Background persists in subsequent meetings.
- Tap None to turn off your Virtual Background.
- Tap on the plus icon and select an image or video on your device to use as your Virtual Background.

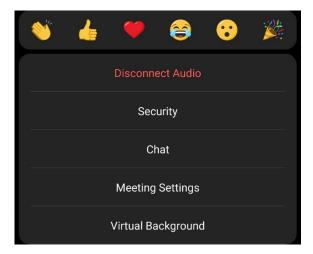
#### MaX UC Mobile (Android)

Follow the instructions below to enable a Virtual Background for your video stream on MaX UC Mobile for Android.

1. Tap on More.



2. Select Virtual Background.



3. The **Virtual Background** window opens, and you can configure the following settings.



- Tap on one of the stock images or videos to set it as your Virtual Background. The Virtual Background persists in subsequent meetings.
- Tap None to turn off your Virtual Background.
- Scroll to the end of the stock images and tap on the *plus icon* to select an image or video on your device to use as your Virtual Background.

#### 6 Webinar controls

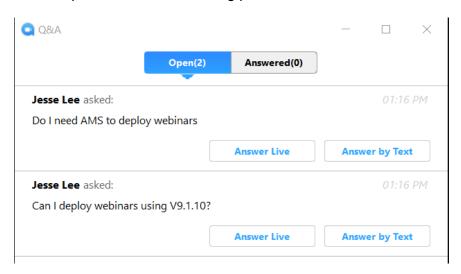
When you start your webinar, you can see the controls toolbar at the bottom of the screen that includes icons that launch the following features.

- 6.1, Q&A panel.
- 6.2, Polls.

### 6.1 Q&A panel

During your webinar, attendees can click the Q&A button and on the toolbar at the foot of the webinar screen to launch the Q&A panel, where they can ask questions.

When attendees ask a question using the Q&A panel, only the hosts and panelists can see the questions on the following panel.



Webinar hosts and panelists can use this panel to answer any questions raised during the webinar:

- Select Answer Live to answer the question over live audio
- Select Answer by Text to type an answer.

Once you have answered a question, it is moved to the **Answered** tab.

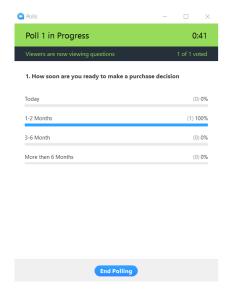
You can obtain reports detailing Questions and Answers that were asked during the webinar.

#### 6.2 Polls

If you want to use polls in your webinar, you must create them in advance, as described in section 4.6. Webinar hosts and/or panelists can launch the polls during the webinar.

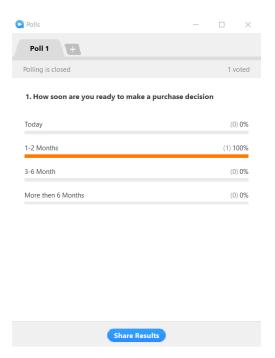
To begin a poll during your webinar:

- 1. Click the Polls ubutton on the webinar toolbar to launch the Polls panel.
- 2. To begin polling, click *Launch polling* to display the following screen.



- 3. You can see attendees responding to the poll in real time as well as view a timer for how long the poll has been active.
- 4. To stop the poll, click End Polling.

You can then see the poll results panel.



- 1. You can share the poll results with your Attendees by clicking Share Results.
- 2. To exit the results panel, click the *x* at the top-right of the panel.

All poll results are available in the webinar reports described in 7.5, Poll report.

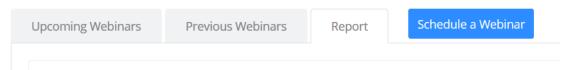
## 7 Webinar reports

To allow you to make the most of your webinar, you can access reports for your Meeting Webinars.

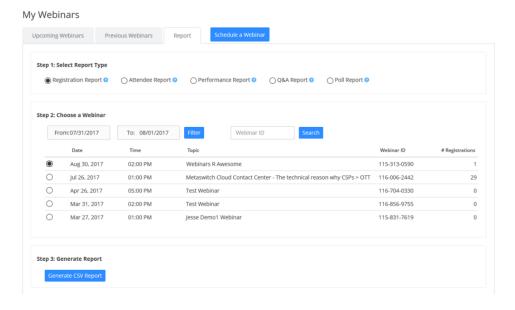
To access reports:

- 1. Go to the My Webinar page.
- 2. Select the Report tab.

#### My Webinars



3. You can then see the following screen, where you can use the radio buttons under **Step 1** to select the report type and under **Step 2** to choose the webinar, and then click on *Generate CSV Report* in **Step 3** to create the report.



For more information on the different reports that are available, see the following sections.

- 7.1, Registration report
- 7.2, Attendee reports
- 7.3, Performance reports

- 7.4, Q&A reports
- 7.5, Poll reports

## 7.1 Registration reports

To create a registration report for a Webinar:

- On the **Report** page, use the radio button under **Step 1** to select the Registration Report Type.
- 2. Use the radio button under **Step 2** to choose the Webinar.
- 3. Click Generate CSV Report at the bottom of the screen.
- 4. This creates an Excel spreadsheet. When prompted, select *Open with Excel* (if you want to view it immediately) or *Save File* to save it.
- 5. The report contains details for each person registered and each question captured during registration.

## 7.2 Attendee reports

To create a report of everyone that attended your Webinar including hosts and panelists:

- 1. On the **Report** page, use the radio button under **Step 1** to select the Attendee Report Type.
- 2. Use the radio button under **Step 2** to choose the Webinar.
- 3. Click Generate CSV Report at the bottom of the screen.
- 4. This creates an Excel spreadsheet. When prompted, select *Open with Excel* (if you want to view it immediately) or *Save File* to save it.
- 5. The report contains information for each attendee including:
  - Actual webinar start time
  - Duration in minutes
  - Total number registered
  - Total number attended
  - Attendance rate
  - Number Q&A questions asked

## 7.3 Performance reports

The Performance report provides information on the percentage of people that registered for the Webinar compared to the actual attendees.

To create a report of everyone that attended your webinar including hosts and panelists:

- On the Report page, use the radio button under Step 1 to select the Performance Report Type.
- 2. Use the radio button under **Step 2** to choose the Webinar.
- 3. Click Generate CSV Report at the bottom of the screen.
- 4. This creates an Excel spreadsheet. When prompted, select *Open with Excel* (if you want to view it immediately) or *Save File* to save it.
- 5. The report contains information for each attendee including:
  - Time when entering the webinar
  - Time when leaving the webinar
  - Total time in webinar

## 7.4 Q&A reports

The Q&A report provides a full list of questions asked and answers provided during the Webinar.

To create a Q&A report:

- 1. On the **Report** page, use the radio button under **Step 1** to select the Q&A Report Type.
- 2. Use the radio button under **Step 2** to choose the Webinar.
- 3. Click Generate CSV Report at the bottom of the screen.
- 4. This creates an Excel spreadsheet. When prompted, select *Open with Excel* (if you want to view it immediately) or *Save File* to save it.
- 5. The report contains each question asked and the text answer as well as the asker's name and email address.

## 7.5 Poll reports

The Poll report provides responses to any polls launched during your Webinar.

To create a Poll report:

- On the **Report** page, use the radio button under **Step 1** to select the Q&A Report Type.
- 2. Use the radio button under **Step 2** to choose the Webinar.
- 3. Click Generate CSV Report at the bottom of the screen.
- 4. This creates an Excel spreadsheet. When prompted, select *Open with Excel* (if you want to view it immediately) or *Save File* to save it.
- 5. The report provides each attendees response for each poll launched during your webinar including:
  - Poll number
  - User's Name
  - User Email
  - Poll Question
  - Poll Response

