

MaX UC Clients

Meeting

Feature User Guide

Notices

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1 MaX UC Clients: Meeting

Meeting is a fully featured web and video conferencing service that adds Web, Video and Audio-conferencing capabilities as both a fully integrated Unified Communications product on the MaX UC Clients, and as MaX Meeting, a standalone product. These solutions provide support for up to 500 participants in a meeting, all with the ability to use video, share their desktop, annotate and more.

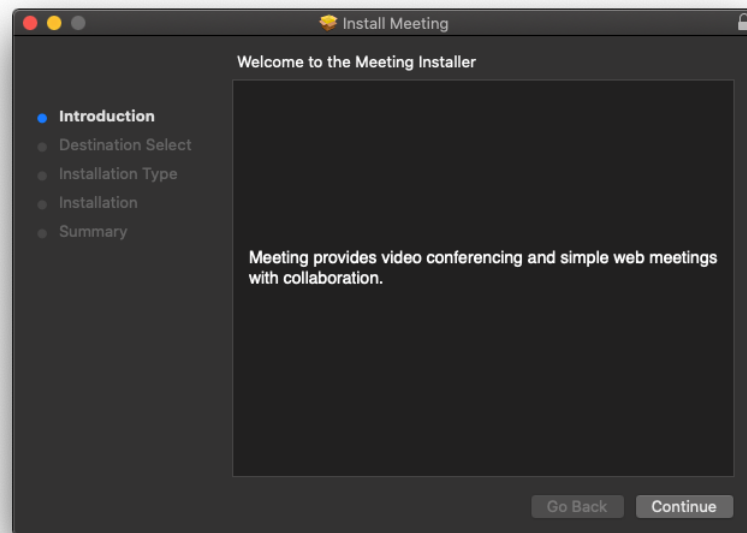
- Meeting generally supports up to 100 participants.
- Some users may be restricted to holding only small meetings of up to 4, 10 or 25 participants.
- Some users may have a license that allows them to create meetings for up to 500 participants.

This document describes how to use the features and function of Meeting when deployed as a fully integrated unified communications product alongside MaX UC Desktop or MaX UC Mobile. If you are using MaX Meeting, the Stand-Alone solution, you should refer instead to the *MaX Meeting Stand-Alone Feature User Guide*.

1.1 Install Meeting on Mac computers

If you are using MaX UC Desktop on a Windows computer, you do not need to install Meeting.

If you are using MaX UC Desktop on a Mac device, you are prompted to install Meeting when you first use the client.

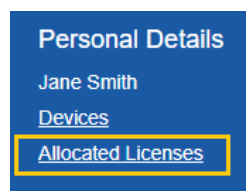


- Press *Continue* to begin the installation.
- Follow the instructions as they appear on the screen.

1.2 Large Meetings (add-on licenses)

Unless restricted to holding only small Meetings, you can create meetings for up to 100 participants. However, you need a special add-on license if you want to create larger meetings of up to 500 participants.

You can see what add-on licenses you have by clicking the *Allocated Licenses* link on the home page of your CommPortal account.



The following pop-up appears giving details of any add-on licenses currently allocated to you.



If you are restricted to holding only small Meetings, you cannot see the *Allocated Licenses* link in CommPortal and cannot obtain any add-on licenses for large meetings.

Contact your system administrator if you need a Large Meeting license.

1.3 Supported Browsers

MaX Meeting supports up-to-date versions of most common browsers, such as Chrome, Firefox, Safari, and Microsoft Edge.

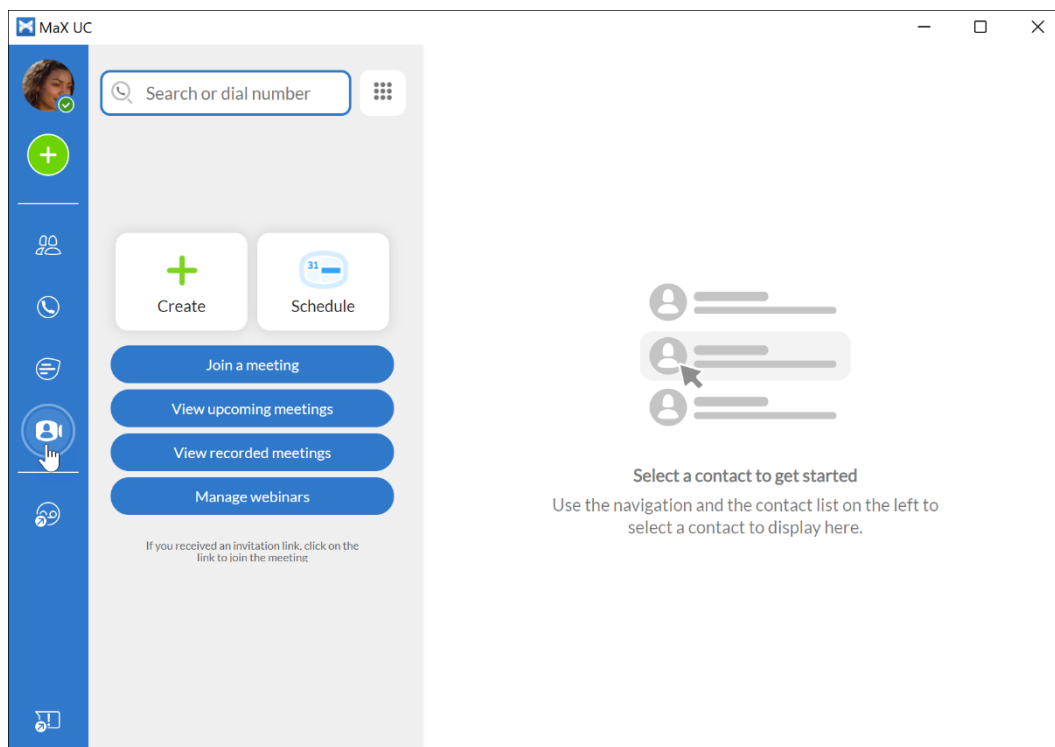
If you are using Firefox and encounter issues, ensure you are using the latest Firefox version by looking online to find out what the latest version of Firefox is.

2 Start an immediate Meeting

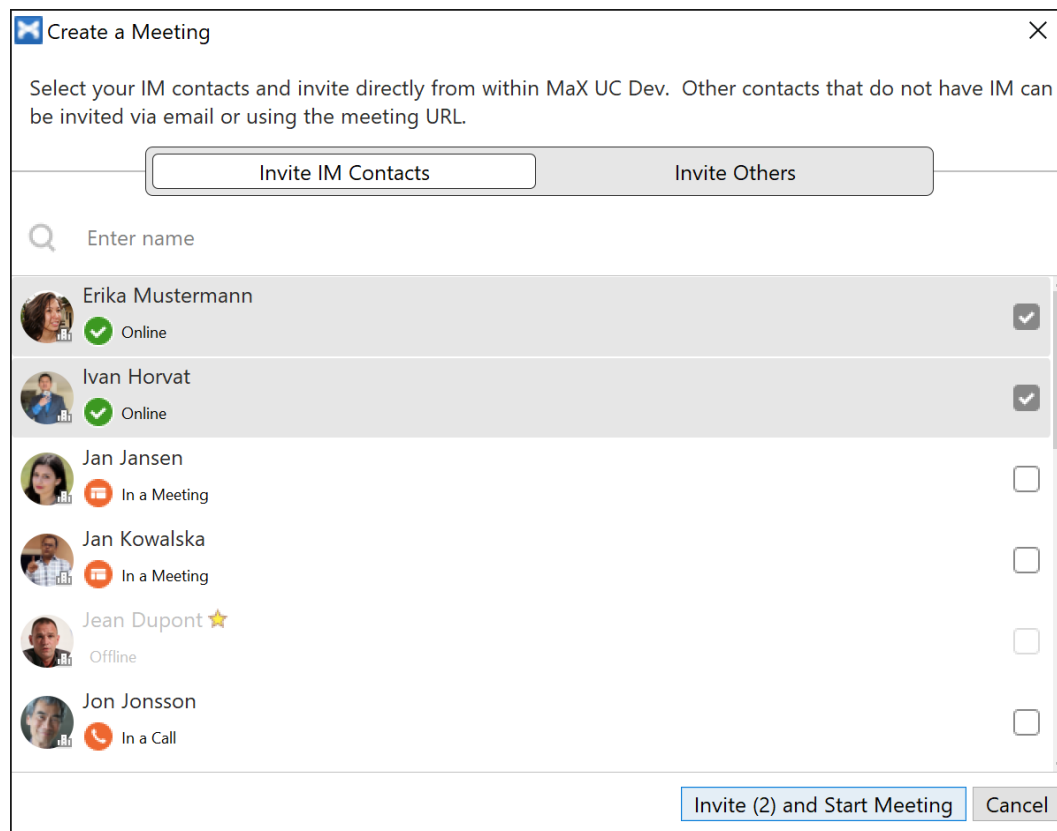
This section describes how to start a Meeting from multiple places in MaX UC Desktop or MaX UC Mobile.

2.1 Start a Meeting from MaX UC Desktop

You can start a meeting on demand from MaX UC Desktop by selecting the *Meetings* tab and clicking *Create*.



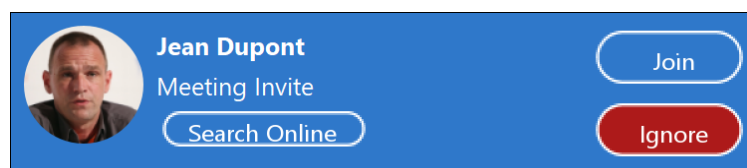
This launches the **Create a Meeting** window, where you can choose one or more people in your business group to invite to the Meeting by clicking the selection box next to the name of each person who you want to invite.



Once you have finished selecting people to invite to your meeting, click *Start Meeting*.

You can only invite internal chat contacts using this method. See section 2.6, *Start a Meeting with a contact outside your Business Group*, for information on how to invite other contacts.

Each contact selected receives an invitation (via their MaX UC Client) like the one shown below.



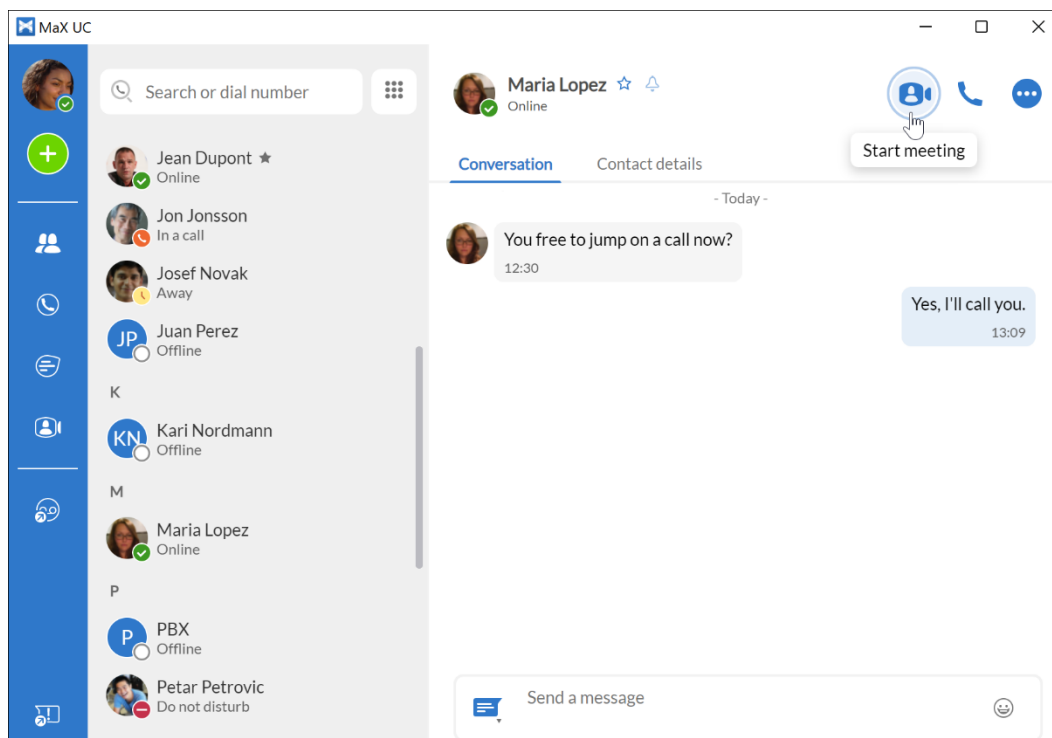
The contact can choose either to join the meeting by clicking *Join* on the invitation or reject the invitation by clicking *Ignore*.

2.2 Start a Meeting from a Directory Entry

You can quickly invite a contact from within your business group to a Meeting.

1. Select a contact on the *Contacts* tab.

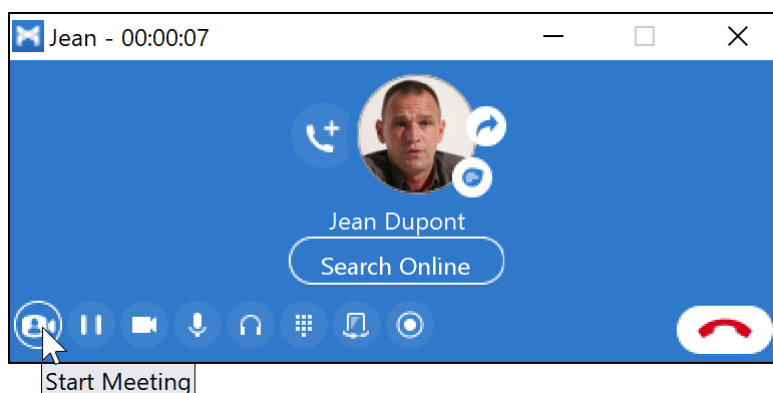
2. Select *Start meeting*.



2.3 Uplift a MaX UC Desktop Call to a Meeting

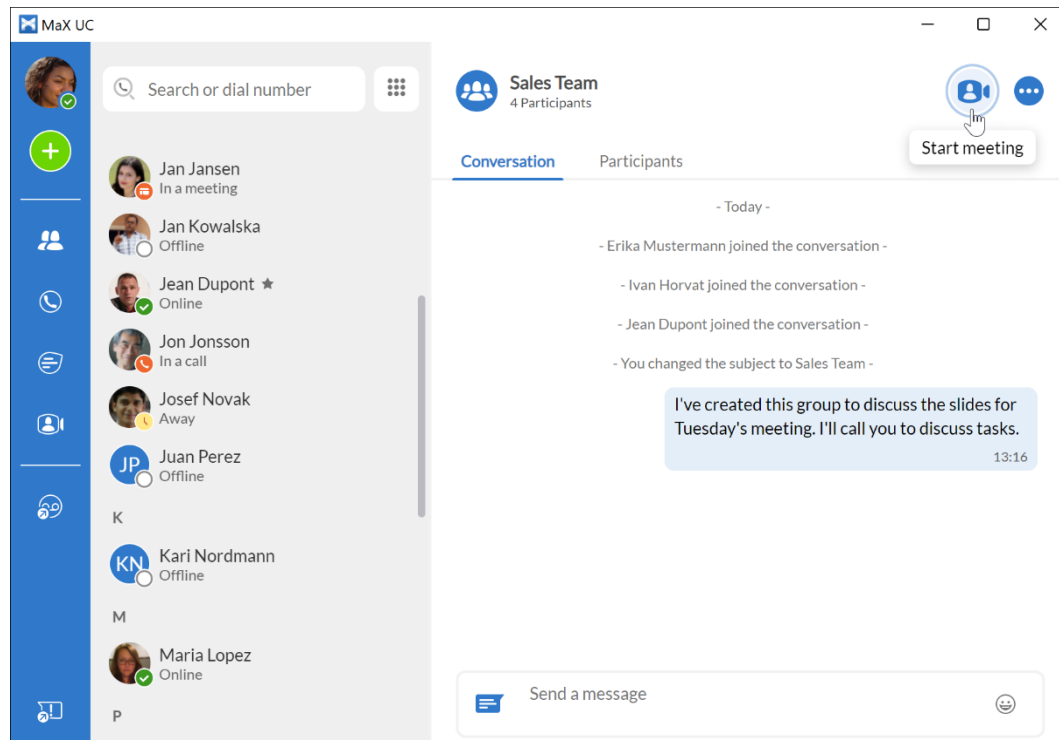
While in a call with another MaX UC user within your business group, you can easily uplift from a voice call to a Meeting Collaboration Room.

Click on the *Meeting* icon in the lower left corner of the call window and select *Start Meeting*.



2.4 Uplift a MaX UC Desktop Group Chat to a Meeting

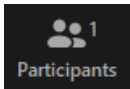
While in a group chat, you can easily uplift to a Meeting. Click on the *Start Meeting* icon in the top right corner of the group chat window.

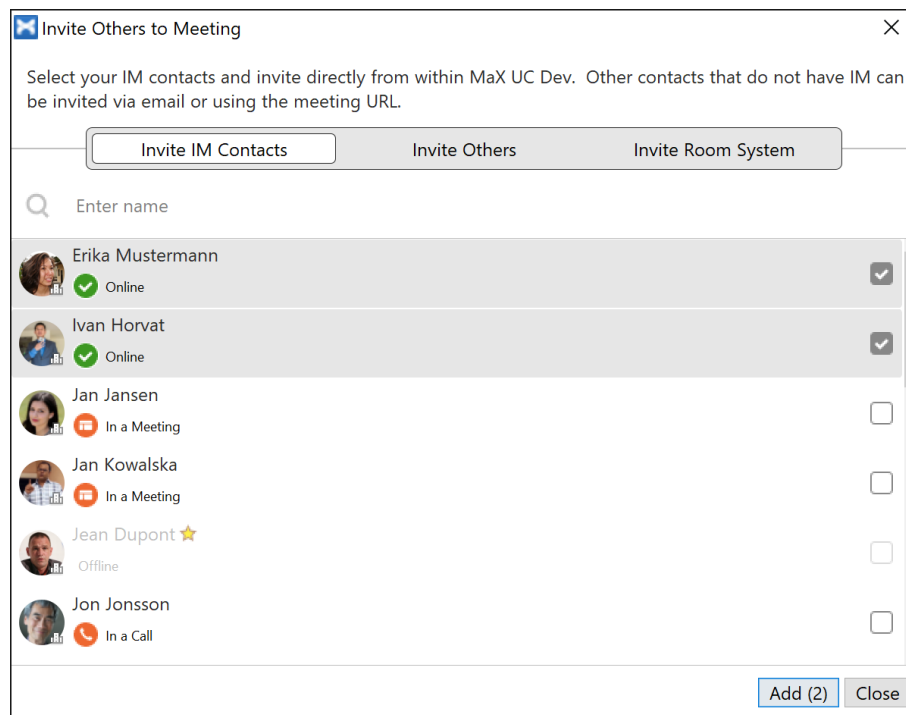


2.5 Invite Additional Participants or Room Systems to a Meeting

2.5.1 Invite Additional Participants

You can easily add additional people to your existing Meeting.

1. Click on the *Participants* icon. 
2. At the bottom of the *Participants* window that appears, click *Invite* to see a list of IM contacts.
3. Select the checkboxes for the contacts you want to invite to your Meeting.



4. Click *Add*.

2.5.2 Add 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. There are two ways to do this.

The screenshot shows a dialog box titled "Invite Others to Meeting" with a close button (X) in the top right corner. Below the title bar, there is a text instruction: "Select your IM contacts and invite directly from within MaX UC Dev. Other contacts that do not have IM can be invited via email or using the meeting URL." Below this instruction are three tabs: "Invite IM Contacts", "Invite Others", and "Invite Room System". The "Invite Room System" tab is selected and highlighted. The dialog is split into two panels. The left panel, titled "From your Room System", contains a "Dial" section with a blurred input field, an "Enter meeting ID" section with a blurred input field, and a section labeled "Or enter code shown on room system" with a "Room Invite Code" input field and an "Invite" button. The right panel, titled "Call a Room System", contains a text prompt "Type the IP address or phone number of the room system you want to invite", an "IP Address or Phone Number" input field, radio buttons for "H.323" (selected) and "SIP", and a "Call Out" button. At the bottom right of the dialog are "Add" and "Close" buttons.

- *Call Out* to the Room System using either the IP address or phone number of the conference room system. When participants using the conference Room System answer your call, they are added into your Meeting.
- *Invite* participants to your Meeting. This provides the IP address to dial and the Meeting ID to enter, when prompted, for participants joining from the Room System.

NOTE: The **Invite Room System** tab is only shown if the Meeting has been joined. Attempting to invite a room system to the Meeting before the Meeting has been joined may not work and could cause confusion for the user, as it isn't obvious whether the room system has successfully joined the meeting. This means the **Create a Meeting** dialog never includes the **Invite Room System** tab, because that dialog is only ever displayed before the Meeting is joined. The email invite still contains information about joining from a room system.

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

- On a H.323 device, you 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 SIP and H.323 room systems supported by Meeting see Appendix A, Supported SIP/H.323 Conference Room Systems.

2.6 Start a Meeting with a contact outside your Business Group

You can start an on-demand Meeting with people outside your business group, however the invitation is sent by email instead of chat.

To start an on-demand Meeting with contacts outside of your business group, simply click on the **Meetings** toolbar in MaX UC Desktop and then click *Create a Meeting*. This launches the **Create a Meeting** window, where you can select *Invite Others*.

Create a Meeting

Select your IM contacts and invite directly from within MaX UC Dev. Other contacts that do not have IM can be invited via email or using the meeting URL.

Invite IM Contacts **Invite Others**

Invite by Phone
You must start the meeting before you can invite by phone.

Enter Number

Enter Display Name

Call Out

Invite by Link
Once you have shared the meeting invite return here to create the meeting.

Send Email Invite

Copy Meeting Link

Start Meeting Cancel

If your deployment is configured to support the Call Out feature, you can see the **Invite by Phone** panel on the left of the **Create a Meeting** window. This enables a Meeting participant who is already in a Meeting to invite someone to join the Meeting by phone. You can either enter the phone number and the display name that will be used to identify the participant in the Meeting or select one of your contacts (which automatically populates the two fields). Then click the *Call Out* button. When the participant answers the call, they hear an announcement telling them how to join the Meeting. This feature can only be used while a Meeting is in progress and only one person can be called at any one time.

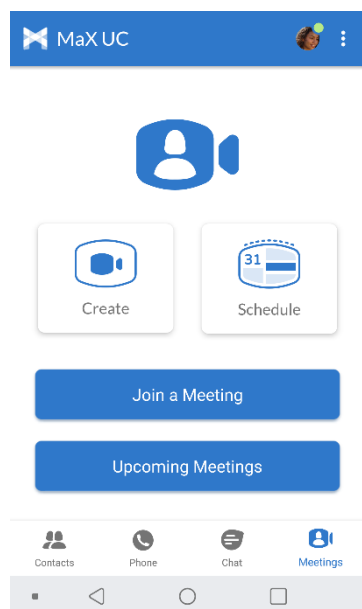
You can also click on *Send Email Invite*. This opens a new email in your default email program with all the information needed for people to join your Meeting. You need to fill in the email addresses of the contacts who should receive the invite in the **To:** field of the email.

You can also use the *Copy Meeting Link* option to copy the URL of the Meeting to your clipboard so that you can send this to anyone who you want to invite, for example by pasting it into a text message. The recipient can click on the link to join the Meeting.

2.7 Start a Meeting from MaX UC Mobile

Your device must be unlocked to start a Meeting or accept a Meeting invite.

You can start a Meeting from MaX UC Mobile. Open the **Meetings** menu option on your mobile device and select *Create*.



You can then see a screen where you can invite your IM contacts to join the Meeting, directly from within MaX UC Mobile. You can also use the *Invite to Meeting* option that appears as an option alongside any IM-enabled contact. This launches the **Create a Meeting** screen prepopulated with the contact's details.

If you want to invite any non-IM contacts to the Meeting, you can click the *Invite Others* option, which allows you to send an email invite or copy the Meeting URL to the clipboard so that you can paste it into a text message.

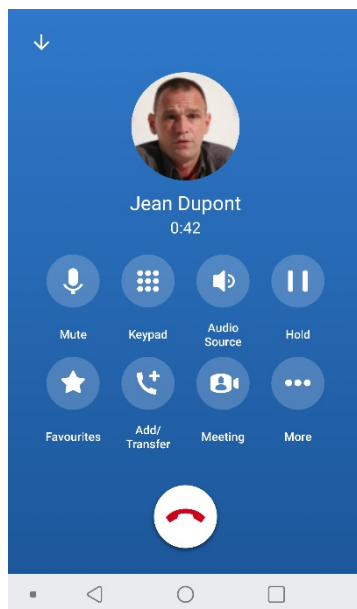
When the Meeting is in progress, you can invite more IM and non-IM contacts to join the Meeting in the same ways. You may also be able to use an *Invite by Phone* option, where you can enter a phone number to call a contact and invite them to join the Meeting.

If you are in a single call with an IM-enabled contact, you can also uplift a MaX UC Mobile phone call to a Meeting.

2.8 Uplift a cellular call to a Meeting

If your service allows you to access MaX UC Mobile features on cellular calls made using your phone's native dialer app, you can start a Meeting with a MaX UC contact using MaX UC Mobile by uplifting an existing cellular call. Select the *Start a Meeting* menu option from the MaX UC Mobile in-call user interface. This feature is only available when you are in a single call with an IM-enabled contact.

On Android and iOS devices, you need to open MaX UC Mobile to access the Meeting feature. You can find *Start a Meeting* on the in-app call screen.



On Android devices, MaX UC Mobile initiates the meeting and seamlessly disconnects the two contacts' audio before connecting them to the Meeting's audio. On iOS devices, if the MaX UC Mobile app is running in the background, the Meeting invitee must accept the uplift via a push notification, after which the Meeting audio connection is seamless.

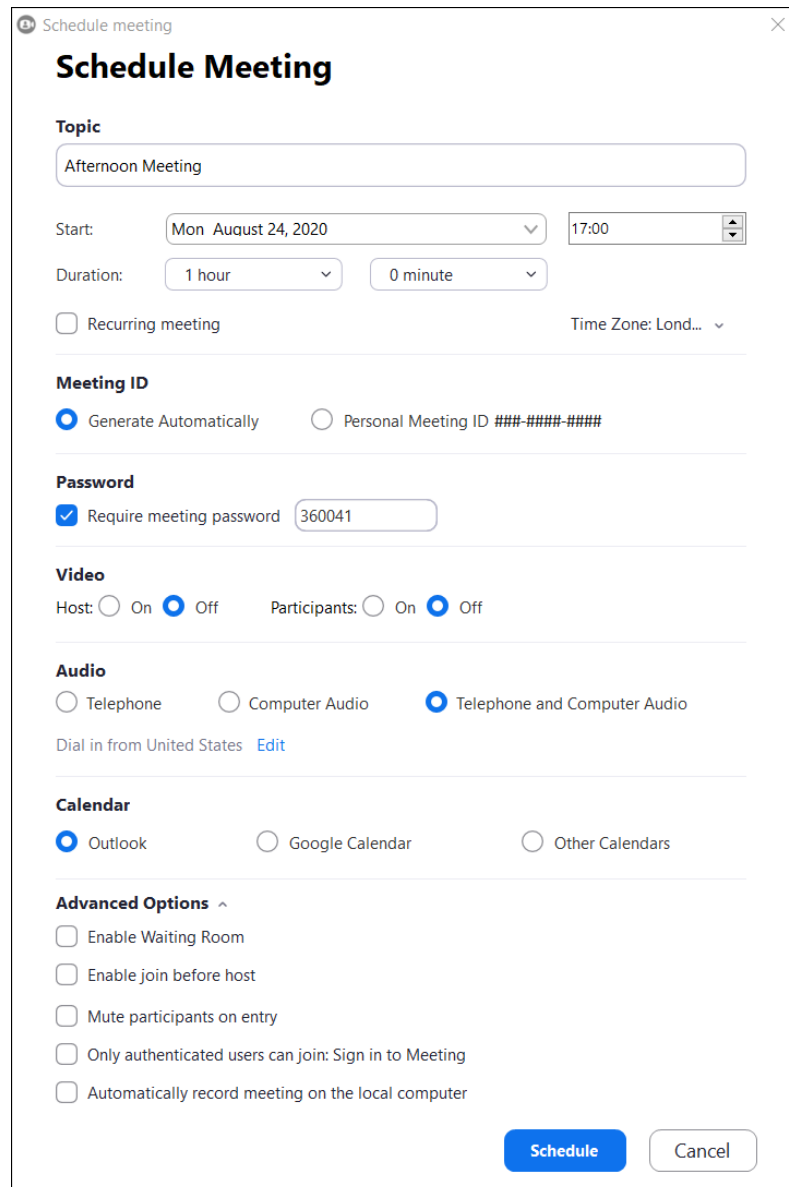
From this point on, you are in a normal meeting except that your audio is connected via the existing phone call. If you choose to leave the Meeting using the Meeting client, you are given the option of remaining connected to the Meeting audio via phone call. If the Meeting host ends the Meeting the call also ends.

3 Schedule a Meeting

As well as creating instant Meetings, you can also use the options in MaX UC Desktop, Outlook Calendar, and MaX UC Mobile to schedule a Meeting for a fixed time in the future.

3.1 Schedule a Meeting from MaX UC Desktop

To schedule a Meeting from MaX UC Desktop, click on the **Meetings** toolbar and select *Schedule a Meeting*. The **Schedule Meeting** window appears.



Schedule Meeting

Topic

Afternoon Meeting

Start: Mon August 24, 2020 17:00

Duration: 1 hour 0 minute

☐ Recurring meeting Time Zone: Lond... ▾

Meeting ID

☒ Generate Automatically ☐ Personal Meeting ID ###-###-####

Password

☒ Require meeting password 360041

Video

Host: ☐ On ☒ Off Participants: ☐ On ☒ Off

Audio

☐ Telephone ☐ Computer Audio ☒ Telephone and Computer Audio

Dial in from United States [Edit](#)

Calendar

☒ Outlook ☐ Google Calendar ☐ Other Calendars

Advanced Options ^

☐ Enable Waiting Room

☐ Enable join before host

☐ Mute participants on entry

☐ Only authenticated users can join: Sign in to Meeting

☐ Automatically record meeting on the local computer

Schedule **Cancel**

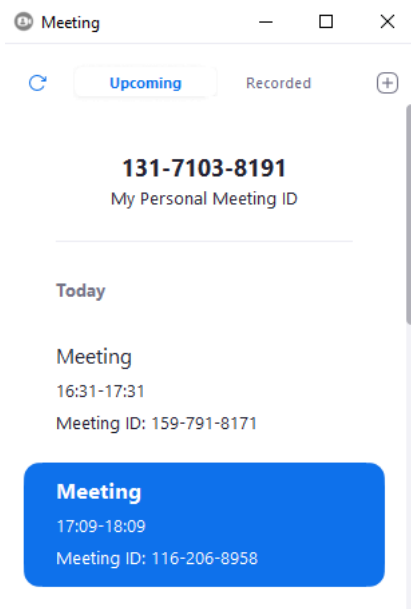
- Enter a **Topic** for your Meeting.
- Select the **Start** date and time for your Meeting. The date and time are set in the **Time Zone** selected. You can also set the Meeting **Duration**, and whether the meeting is a **Recurring meeting**.
- Use the Meeting ID section to automatically generate a new Meeting ID for the meeting or to use your Personal Meeting ID.
- Use the **Password** section to select whether participants need to enter a password before being admitted to the Meeting and to set the password, if required.
 - 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 enter. 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. These changes apply to all the Meetings that you have currently scheduled.
- Use the **Video** section to set the default video settings for yourself and participants. When *On* is selected, your video automatically starts when you join the Meeting.
- Use **Audio Options** to select how participants can connect to the audio for the Meeting.
- Use the **Calendar** section to select the calendar format for the invitation, including Outlook, Google, and Other/Generic calendars.
- Use the **Advanced Options** to:
 - **Enable Waiting Room** - this feature keeps participants in a waiting room until you admit them to the Meeting.
 - **Enable join before host** - participants can join the Meeting before the host.
 - **Mute participants on entry** - participants are automatically muted once they enter the Meeting.
 - **Automatically record meeting on the local computer** - choose whether you want to automatically record the Meeting on your local computer. You can use a setting in 10.3.4, Recording settings to set Meeting to automatically record each Meeting as soon as it starts.

- **Only authenticated users can join: Sign in to Meeting** - when enabled, only users who are logged in to a Meeting client or who follow a URL on a device that is running a logged in Meeting client can join the Meeting. This option prevents unauthorized users from joining your Meeting.

Once you have scheduled a Meeting, use the *View Upcoming Meetings* option under **Meetings** on the MaX UC Desktop UI to:

- start the Meeting
- edit the Meeting settings
- delete the Meeting
- copy the Meeting settings to the clipboard from where you can paste them into an email.

The **Upcoming Meetings** screen also includes options to start or schedule a Meeting that uses your **Personal Meeting ID**, or to edit it. However, if you edit the PMID, you must remember that this changes the PMID used on any Meetings that you have already scheduled, and participants cannot join a Meeting if they use your old PMID (e.g. because they have follow a link in an invitation sent prior to the PMID change).



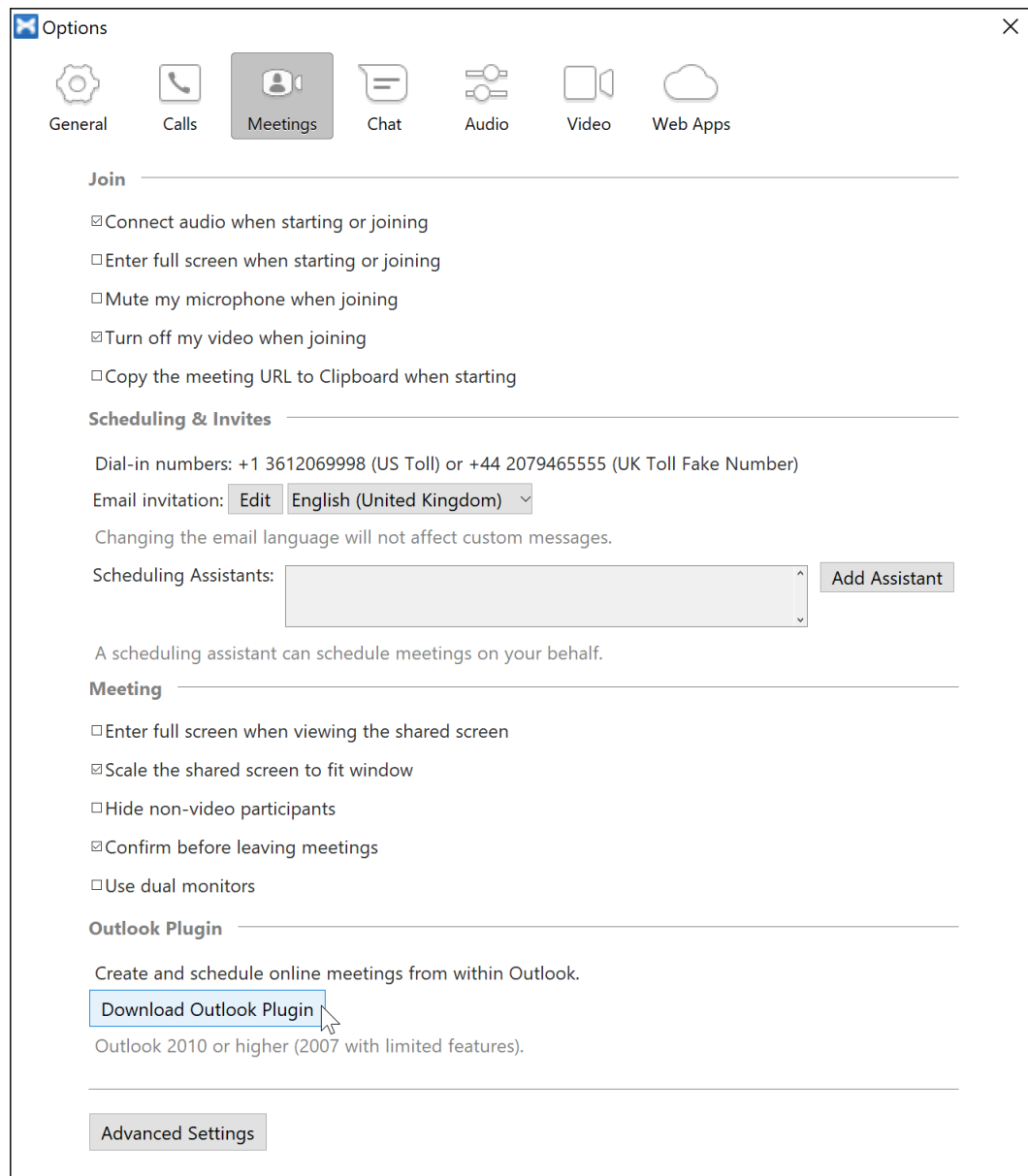
3.2 Schedule a Meeting from Outlook

Meeting provides an Outlook plugin that you can use to schedule Meetings from your Outlook calendar with one-click. You can also use the plugin to start an instant Meeting with your Outlook contacts.

3.2.1 Download and install the Outlook Plugin

You can easily download the Meeting calendar plugin from MaX UC Desktop.

1. Click on your avatar and select *Settings*.
2. On the *Options* window that appears, select the *Meetings* tab.
3. Underneath the *Outlook Plugin* heading, click *Download Outlook Plugin*.



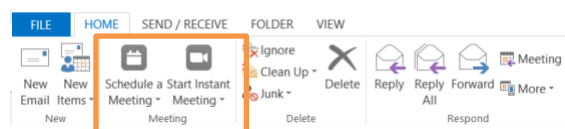
Once you click *Download Outlook Plugin*, your default browser opens to download the file.

- At the prompt, choose *Yes* to save the file.

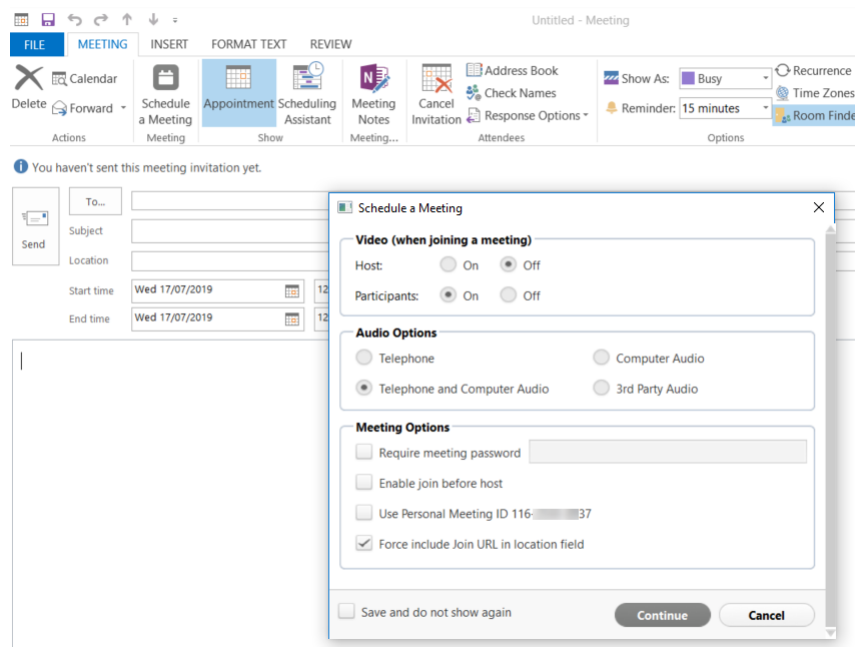
- Open your downloaded files in your browser. You should see a file named `AccessionMeetingOutlookPluginSetup.msi`. Click or double-click (as appropriate) to open the file.
- When you see the prompt **Do you want to run this file**, select *Run* to launch the install wizard.
- Select *Next* at the **Welcome** screen.
- At **Select Install Folder**, accept the default install location by selecting *Next*.
- Click *Next* to confirm and begin the installation. If you receive a message asking if you want to allow the program to install, select *Yes*.
- Once the installation is complete, click *Close*.

3.2.2 Schedule a Meeting using Outlook Calendar

Once you have downloaded the Outlook plugin, you can see new icons on the toolbar for Meeting when you open Outlook Calendar.



To schedule a Meeting, click *Schedule a Meeting*. The **Schedule a Meeting** window appears.

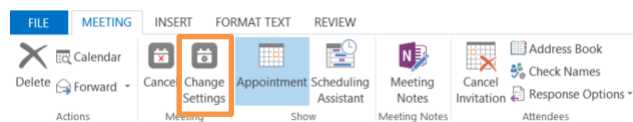


Use the **Schedule a Meeting** window to set various options for the Meeting.

- Use the **Video (when joining a meeting)** section to set the default video settings for yourself and the participants. If you select *On*, video automatically starts when you join the Meeting.
- Use **Audio Options** to select how participants can connect to the audio for the Meeting.
- Use **Meeting Options** to:
 - set a password that participants must enter to join 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 *Save and do not show again*. The next time you schedule a Meeting, the same settings are used, and you will not see this screen.

If you want to change the settings at any time, when you create a Meeting select *Change Settings* on the Meeting calendar toolbar.



Once you have configured the settings for the Meeting, click *Continue*. You can then see an Outlook Appointment invitation that includes the joining instructions for the Meeting. You can enter a list of participants in the **To** field, set the date and time for the Meeting, and (optionally) add more text to the body of the invitation email.

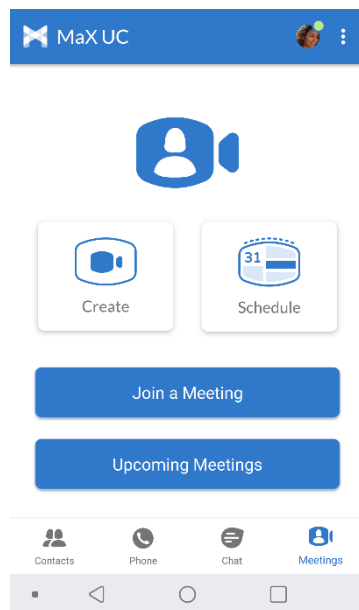
You can also see details of the Meeting on the *View Upcoming Meetings* option under **Meetings** on the MaX UC Desktop UI described in 3.1, Schedule a Meeting from MaX UC Desktop. Schedule a Meeting from

3.2.3 Schedule a teleconference-only Meeting

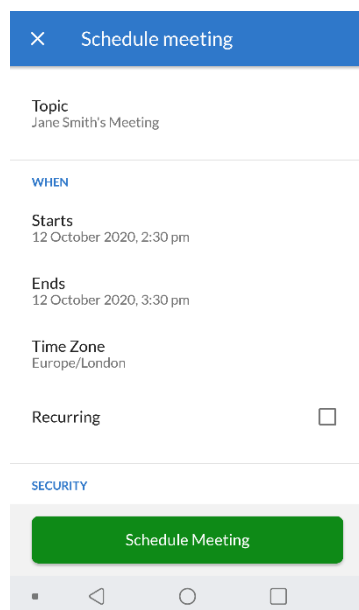
You can schedule a Meeting in which the host is dialing into the Meeting. You can do this using any of the scheduling options described in this manual. However, you must ensure that you tick *Enable join before host* on the **Meeting Options** panel when you schedule the Meeting.

3.3 Schedule a Meeting from MaX UC Mobile

To schedule a Meeting from MaX UC Mobile, click on the *Meetings* icon on your mobile device and select *Schedule*.



This launches another page where you can configure the settings for the Meeting.



On this screen you can:

- Enter a topic for the Meeting.
- Select whether this is a one-off or recurring Meeting. If it is a one-off Meeting, you can also set the start and end time and configure the time zone.
- Set audio and video options for the Meeting.
- (Optionally) set a password for the Meeting that participants must enter before they can join.
- Choose whether participants can join the Meeting before the host has joined.

- Choose whether to use your Personal Meeting ID for the 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.

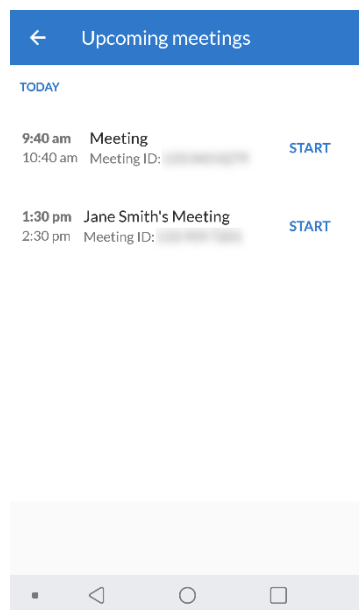
Once you have configured these settings, click *Done* in the top-right corner of the MaX UC Mobile UI.

You can then choose whether to add invitees by email or by creating a calendar event.

- If you select to use email, you can see an email displayed in your device's preferred email app that contains all the details for the Meeting. You can enter the invitees in the **To** field and send the invitation.
- If you choose to create a calendar event, you can see your device's preferred calendar app.

Once you have set up your first Meeting, MaX UC Mobile remembers these settings for the next time you want to schedule a Meeting.

You can see the Meetings that you have scheduled by tapping *Upcoming Meetings* on the **Meetings** screen.



On this screen, you can start or make changes to upcoming Meetings.

- If a Meeting is scheduled for today, or is a recurring meeting, you can tap *START* to begin the Meeting.
- If you want to make a change to an upcoming Meeting, tap on the Meeting to open a screen where you can:

- Start the Meeting (even if it is not the time the Meeting is scheduled for).
- Edit the settings for the Meeting.
- Invite more participants.
- Delete the Meeting.

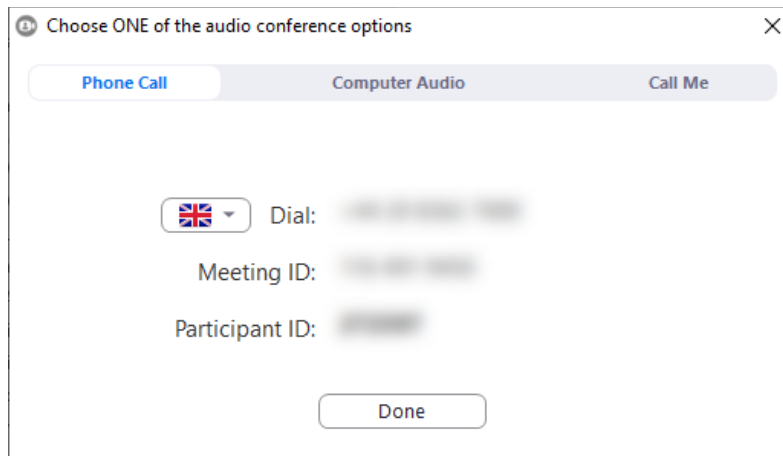
4 Connect audio and video

Meeting uses the OPUS HD voice codec for connecting calls via your computer as well as dial-in connections from any telephone. Because Meeting supports HD voice, you may notice that your audio connections sound best when you connect via your computer.

4.1 Dial-in connections from the Meeting client

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

1. Click on *Join Audio* on the lower-right of the window.
2. Select the **Phone Call** tab.



The screenshot shows a dialog box titled "Choose ONE of the audio conference options". It has three tabs: "Phone Call", "Computer Audio", and "Call Me". The "Phone Call" tab is active. Below the tabs, there is a country selection dropdown menu showing the United Kingdom flag. To the right of the dropdown is a "Dial:" field. Below this are "Meeting ID:" and "Participant ID:" fields. At the bottom center is a "Done" button.

3. Select the country that you are calling from using the dropdown next to the **Dial** field.
4. Dial the number listed in the **Dial** field.
5. At the audio prompts, enter the Meeting ID and Participant ID as shown on the **Phone Call** tab.

If you forget to enter your Participant ID when joining the Meeting, you can also enter your Participant ID after joining the Meeting by dialing **#participant_ID#** (replacing **participant_ID** with your ID) from your DTMF phone.

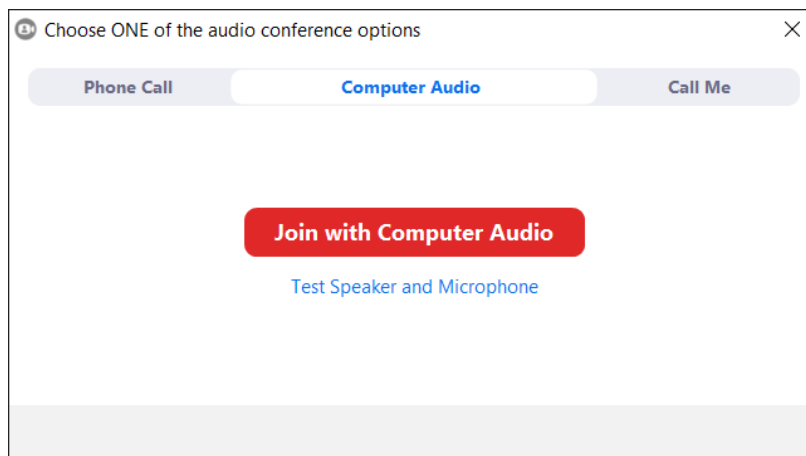
4.2 Dial-in connections from the PSTN

To dial into a Meeting from the PSTN, 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 need to open the Meeting to obtain the dial-in number. If you are the host and are joining from a dial-in number, you must schedule the Meeting with *Enable join before host* enabled.

4.3 Connect audio from your computer

You can easily connect your computer audio to a Meeting. However, this works best if you have an audio headset connected to your PC. After joining or starting a Meeting, click *Join with Computer Audio* to connect your computer's speaker and microphone to the Meeting.



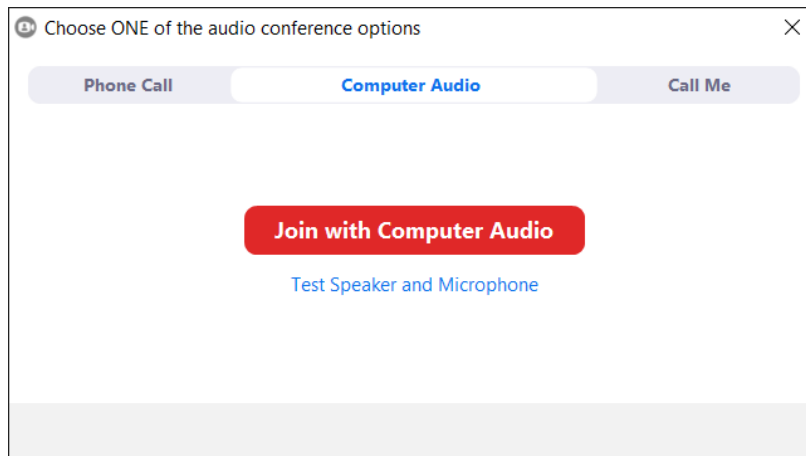
If you prefer to use your computer's speaker and microphone, you can set Meeting to automatically connect your audio via your computer. To set this in MaX UC Desktop, select your avatar and select *Settings*. In the *Options* window that appears, select the *Meetings* tab and select *Connect Audio when starting or joining*.

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.

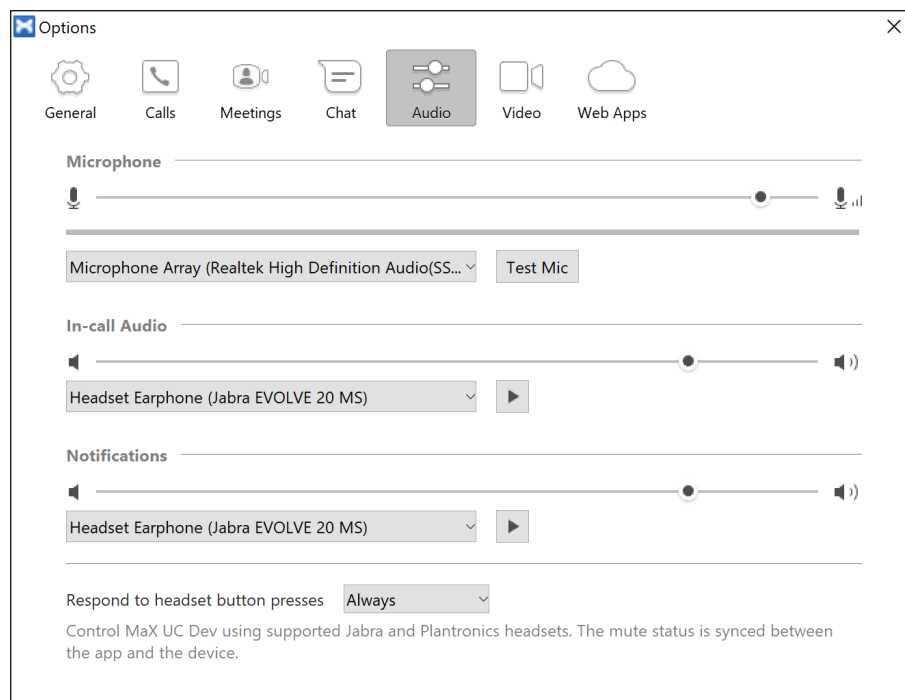
4.4 Configure and test computer audio from MaX UC Desktop

You can configure and test your audio settings from both your MaX UC Desktop Options and directly from the Meeting application. Once you have accessed them, these settings operate the same regardless of which method you used to access them.

To access your computer audio from Meeting, select the *Test Speaker and Microphone* option in the **Computer Audio** screen.



To test your computer audio from MaX UC Desktop, click on your avatar and select *Settings*. On the *Options* window that appears, select the *Audio* tab.



4.4.1 Microphone settings

Use the **Microphone** options to select your microphone and test that it is working correctly.

- Select your headset audio microphone using the dropdown list under **Microphone**. Select the headset or device that you will use to transmit your voice.
- Click *Test Mic* and record a sample so that you can hear the quality of your headset microphone.
- Control the microphone volume using the sliding volume bar.

4.4.2 In-Call Audio Settings

Use the **In-Call Audio** settings to control the audio received by your device.

- Select your headset/speaker audio device using the dropdown list under **In-Call Audio**. Select the headset or device that you want to use to receive audio from your computer.
- Click the *play* icon to verify your headset/speaker volume. This plays sound over your selected device.
- Control the headset/speaker volume using the sliding volume bar.

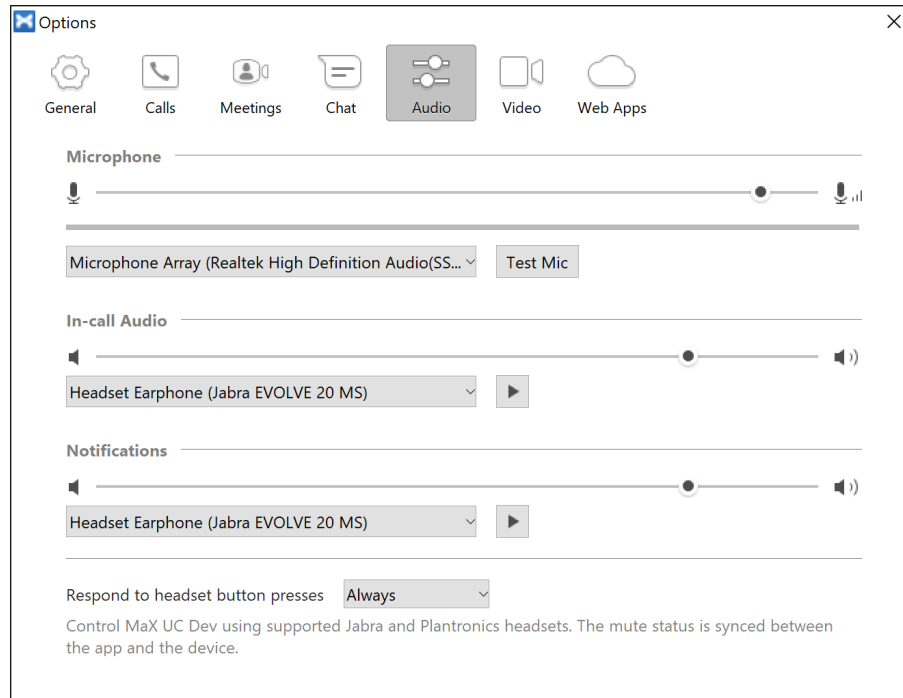
4.4.3 Notification settings

Use the **Notifications** options to set the device to ring for incoming calls and other MaX UC Desktop notification sounds; this should generally be your PC sound device but can also be your headset.

- Select the notification headset/speaker volume using the sliding volume bar.
- Click the *play* icon to verify the headset/speaker volume for notifications. This plays sound over your selected device.

4.4.4 Integrated headset support

If you have a supported model of Jabra or Plantronics headset and are using a Windows computer, you can choose to integrate the call and mute buttons on the headset so that you can use these with Meeting.



- Use the drop-down alongside **Respond to headset button presses** to select either *Always* or *While unlocked*. (If MaX UC Desktop does not support this on your headset, you will see an error message when you select either of these options.)
- You can use the call button on the headset to join a Meeting when you receive an incoming Meeting invitation and to leave the meeting.
- You can use the mute button to mute or unmute yourself while in a Meeting. The headset mute button is synchronized with the Meeting's mute state.

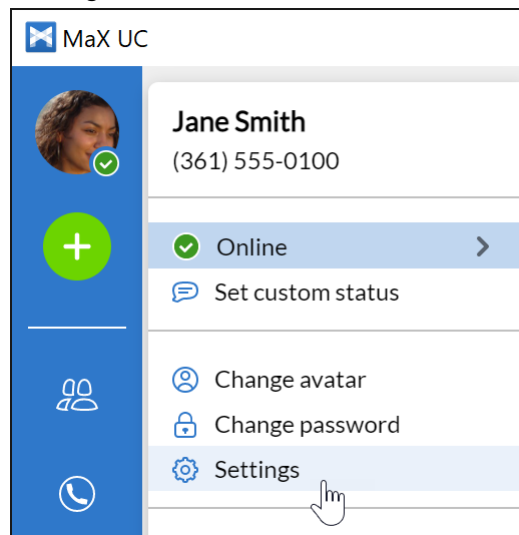
This feature is built using APIs made available by headset vendors Plantronics and Jabra. Support for this feature is offered AS IS and is subject to continued availability of these vendor APIs.

4.5 Manage your Video Settings

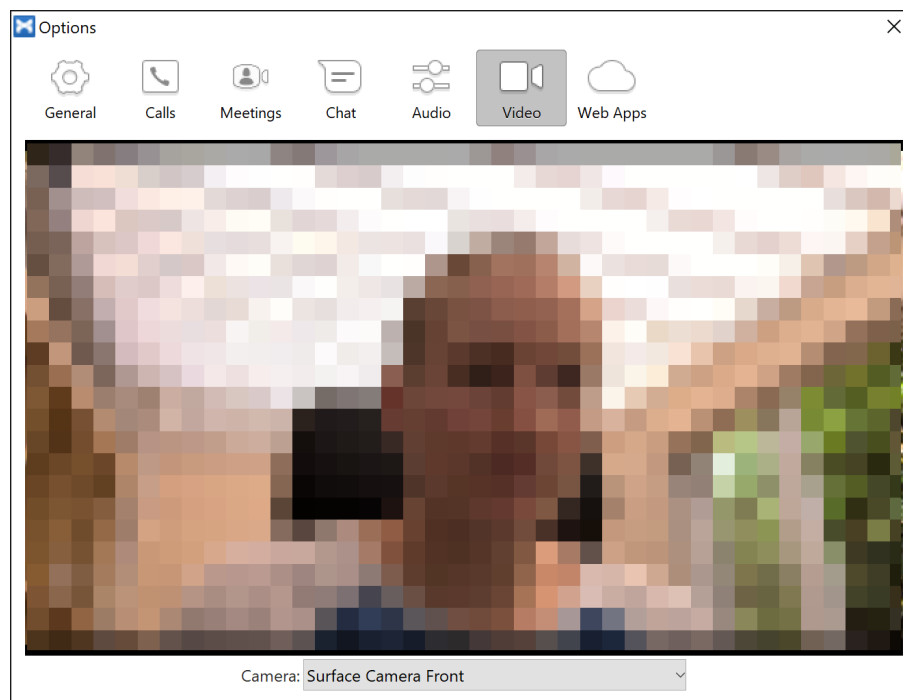
Meeting can support video up to 720p with a refresh rate of 30 frames per second.

You can configure your video settings from MaX UC Desktop and directly from the Meeting application. The settings operate the same regardless of which method you use to access them.

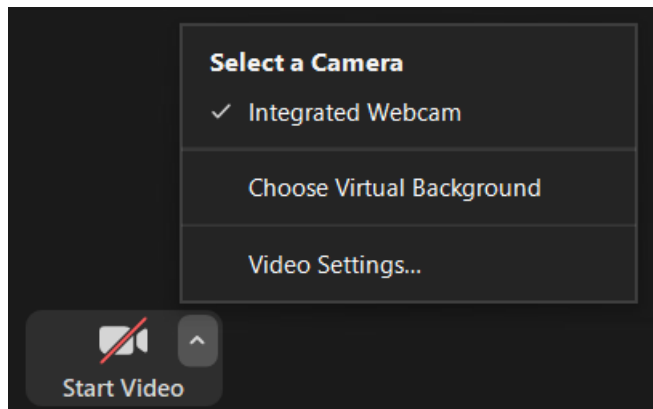
- To access your video setting from MaX UC Desktop, select your avatar and select *Settings*.




In the *Options* window that appears, select the *Video* tab. Use the *Camera* drop-down 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*.



4.6 Share your video in a Meeting

To share your video in a Meeting, click the *Start Video*  icon located at the lower left of the Meeting screen.

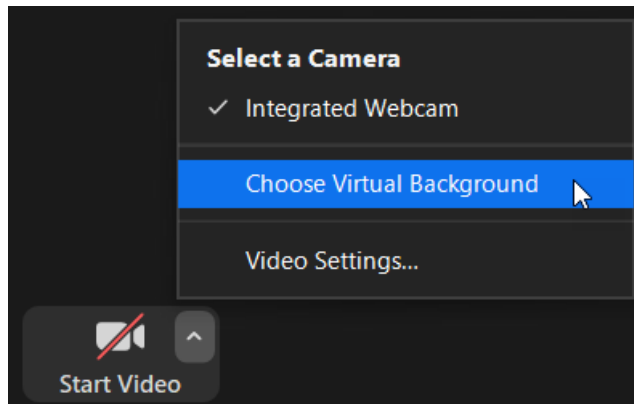
To stop sharing your video, click the *Stop Video*  icon that replaces the *Start Video* icon described above.

4.7 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

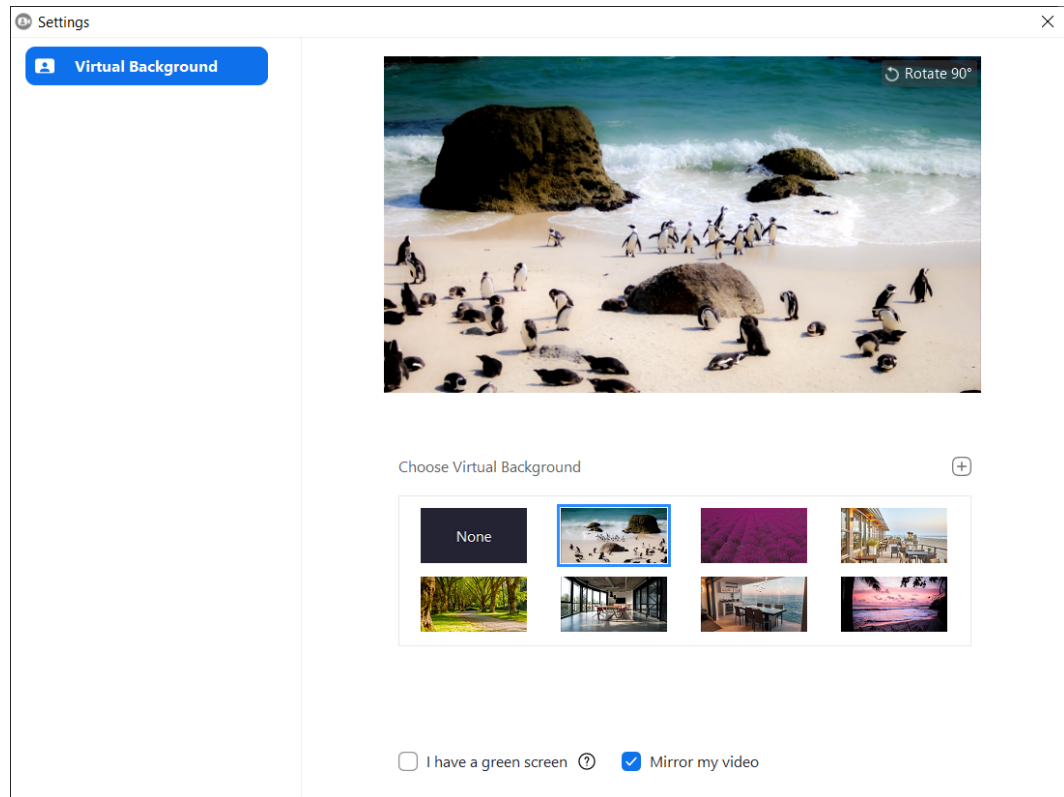
On MaX UC Desktop, expand the menu next to the video icon and select *Choose Virtual Background*.



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

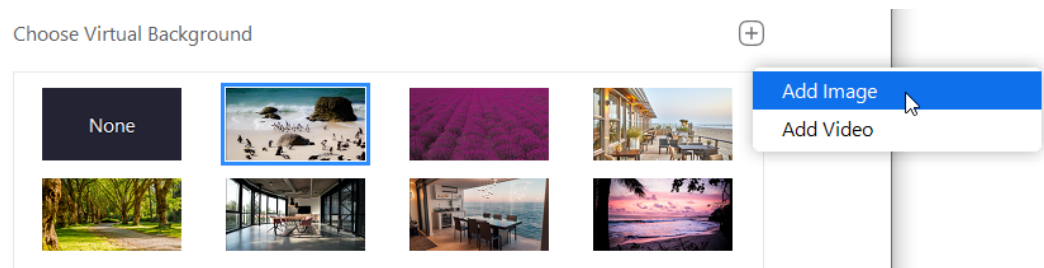
The **Virtual Background** window opens, and you can configure the following settings.

- 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  ☐ 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.

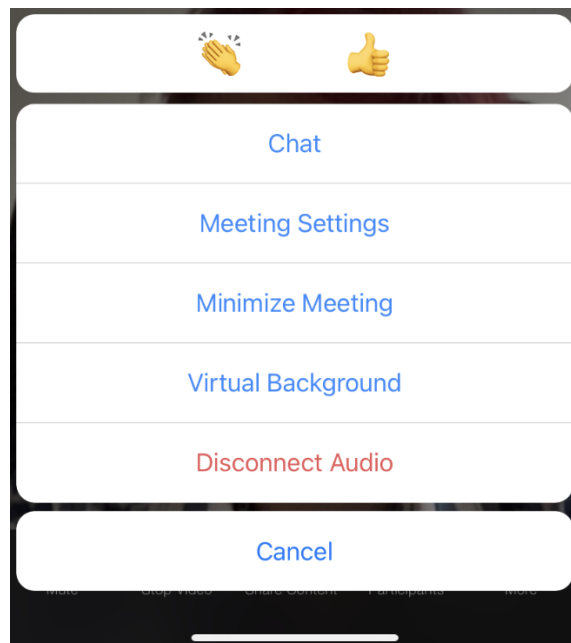
MaX UC Mobile (iOS)

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

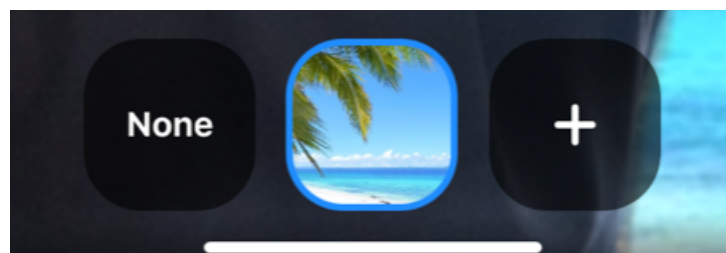
1. Tap on *More*.



2. Select *Virtual Background*.



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



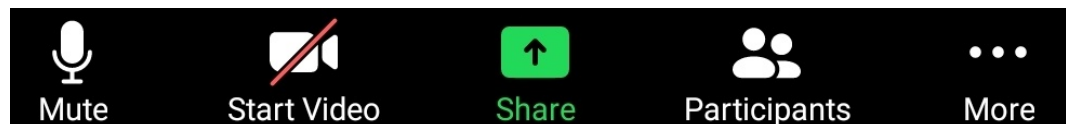
- Tap on one of the stock images or videos to set it as your Virtual Background. The Virtual Background persists in subsequent meetings.

- Tap *None* to turn off your Virtual Background.
- Tap on the *plus icon* and select an image or video on your device to use as your Virtual Background.

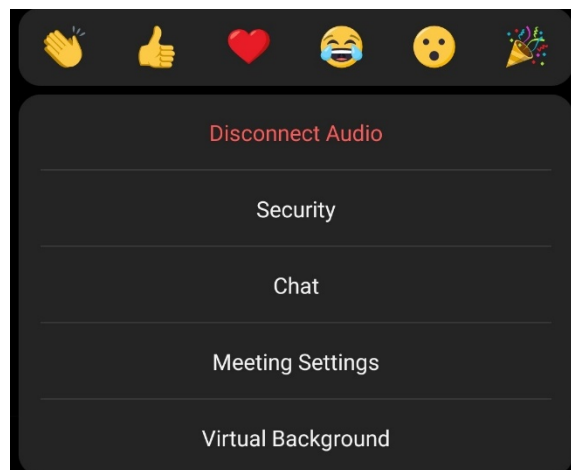
MaX UC Mobile (Android)

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

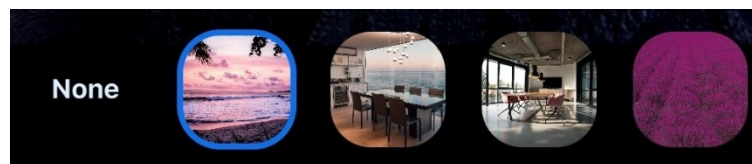
1. Tap on *More*.



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.

4.8 View participant videos 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 only see the video of the person who is currently speaking.
- In **Gallery** mode, you can see up to nine video feeds on your screen and the active speaker is highlighted, as shown below. When there are more than nine people in the Meeting, you can see a scroll arrow that you can use to scroll through the video feeds.

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

50 Attendee Interface



If you have the large meeting add-on package described in section 1.2, Large Meetings (add-on licenses, you can see up to 50 video feeds on screen with the active speaker highlighted as well as a scroll arrow to scroll through the video feeds.

100/200 Attendee Interface



4.8.1 Far-end camera control

Far End Camera Control allows another user 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 Meeting host is the only user that can request far end camera control.

You must also enable far end camera control in your **Advanced Meeting** settings, as described in section 10.3.3, In Meeting (Advanced).

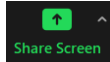
5 Share your Screen

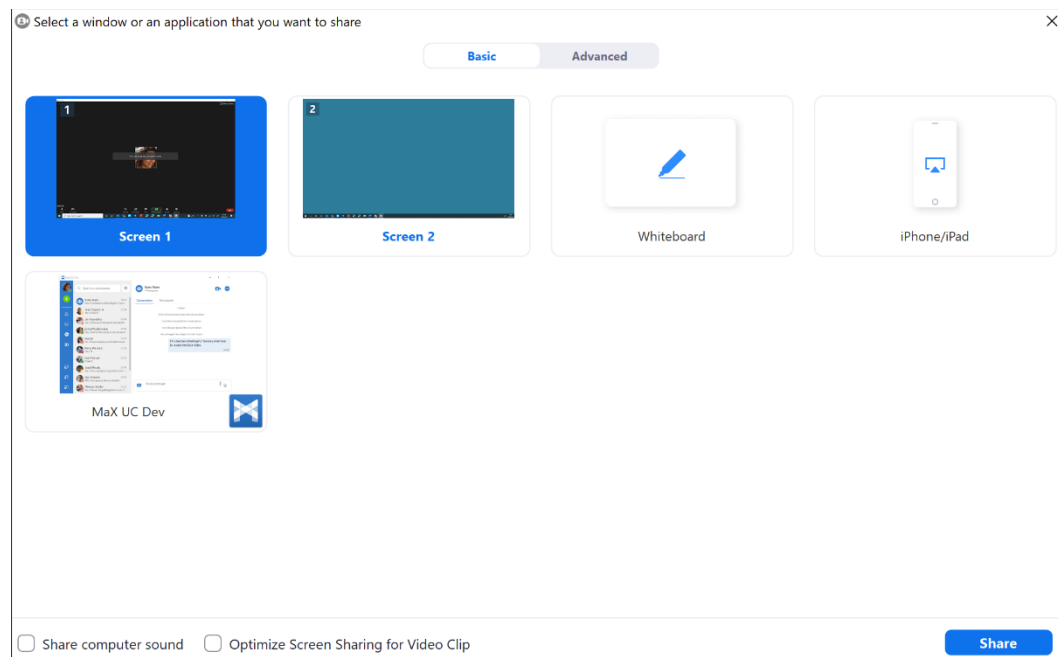
There are several different options for sharing your screen during a Meeting. Multiple participants can share their screen simultaneously.

5.1 Share Desktop

You can share your desktop with other Meeting participants.

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.

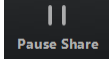
To share your desktop in a Meeting, click the *Share Screen*  icon at the bottom of the Meeting screen.



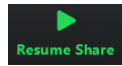
1. Select the **Screen** as highlighted in the screenshot.


2. If you plan to share sound from your PC and/or are showing video, tick the checkbox(es) for **Share computer sound** and/or **Optimize Screen Sharing for Video Clip**.


3. Click *Share*. Your screen is now shown to everyone in the meeting.

4. To pause the screen, click the *Pause Share*  icon at the top of the screen. When this button is active, other participants see a snapshot of the screen that was being shared when the *Pause Share* button was clicked.

Participants continue to see this view until you click either the *Resume Share*



Resume Share icon or the *Stop Share*  **Stop Share** icon.

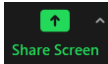
5. If you have multiple monitors, click on the *New Share*  icon to change the screen that you are sharing.

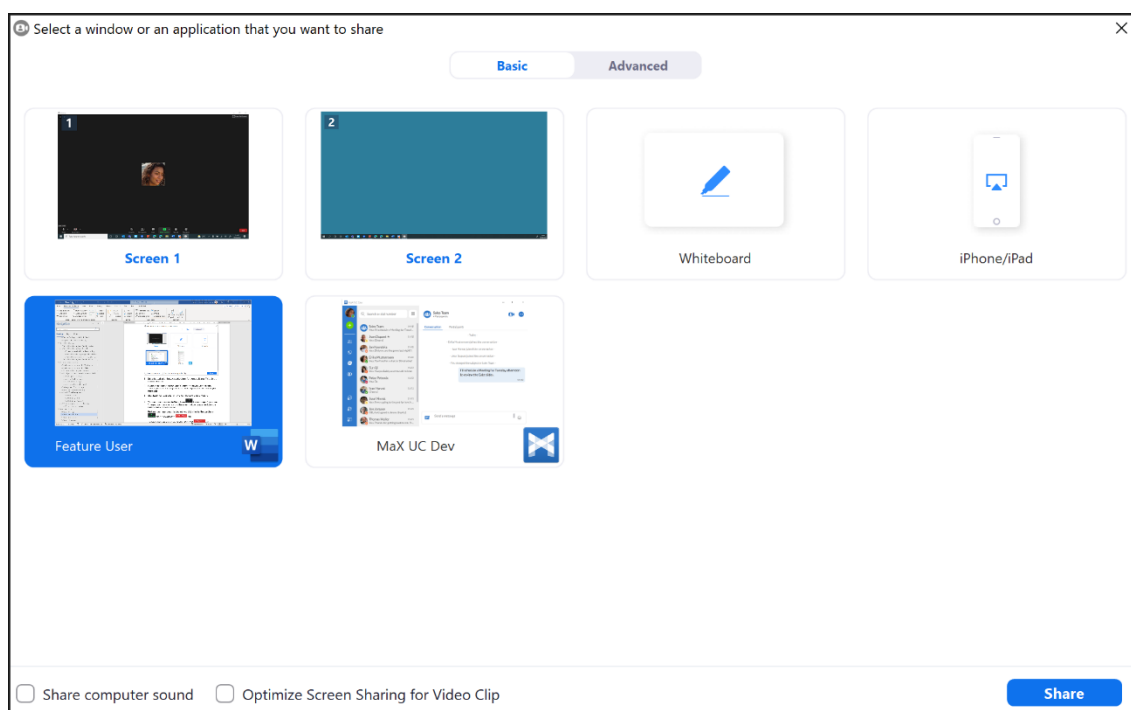
6. To stop sharing your desktop, click the *Stop Share*  **Stop Share** icon.

5.2 Share an application

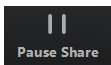
You can share a selected application, for example Microsoft Word, with Meeting participants. If you change to another application, Meeting participants cannot see the other application.

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, click the *Share Screen* icon  located on the bottom menu bar.




1. Select the application that you want to share - for example, Microsoft Word in the screenshot above.
2. If you plan to share sound from your PC and/or are showing video, tick the checkbox(es) for **Share computer sound** and/or **Optimize Screen Sharing for Video Clip**.
3. Click *Share*. Your application is now shown to everyone in the Meeting.

4. To pause the screen, click the *Pause Share*  icon at the top of the screen. Other participants see a snapshot of the screen that was being shared when the *Pause Share* button was clicked.


Participants continue to see this view until you click either the *Resume Share*

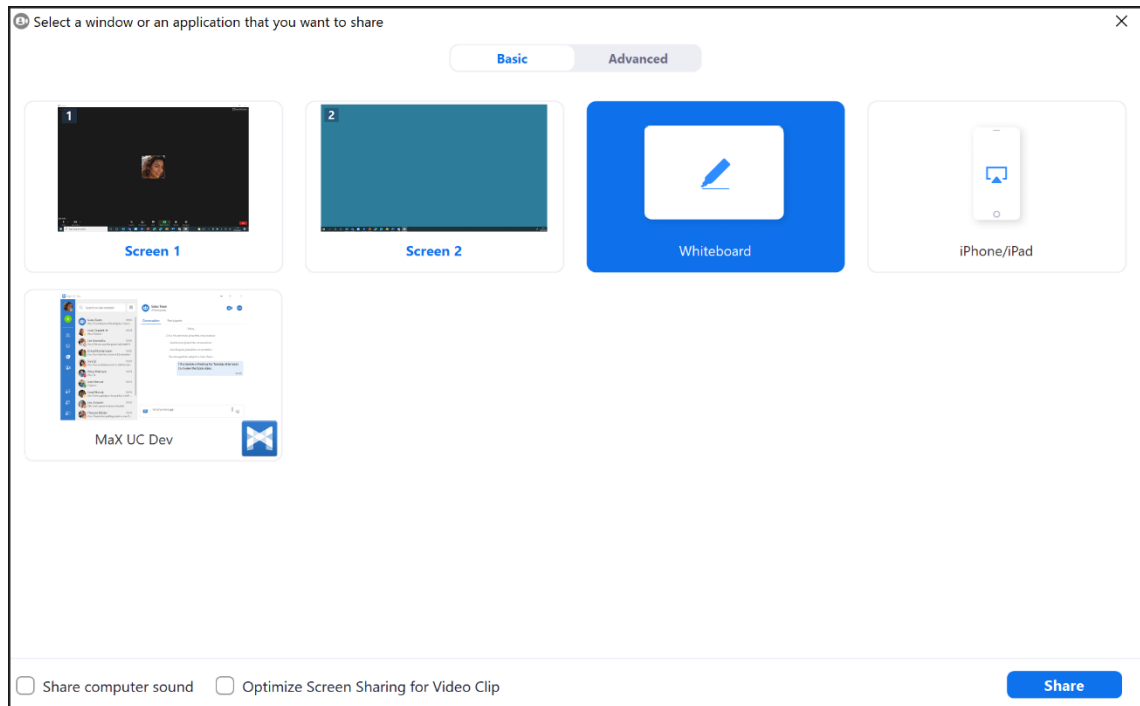
 icon or the *Stop Share*  icon.

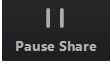
5. To stop sharing your application, click the *Stop Share*  icon.

5.3 Share Whiteboard

You can share a whiteboard that the host and participants can annotate using the annotation tools described in section 7, Use Annotation Tools.


To share your whiteboard in a Meeting, click the *Share Screen* icon  located on the bottom menu bar.



1. Select the **Whiteboard** as highlighted above.
2. Click *Share*. Your whiteboard is shown to everyone in the meeting.
3. To pause the screen, click the *Pause Share*  icon at the top of the screen. Other participants see a snapshot of the screen that was being shared when the *Pause Share* button was clicked.

Participants continue to see this view until you click either the *Resume Share*

 icon or the *Stop Share*  icon.

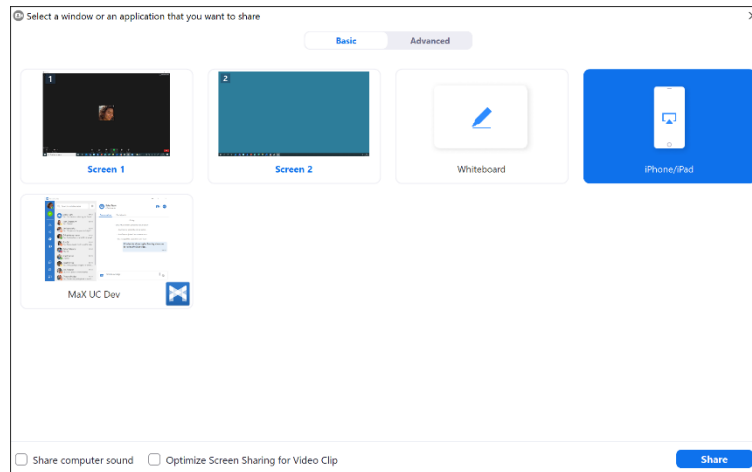
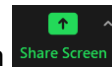
4. To stop sharing your whiteboard, click the *Stop Share*  icon.

5.4 Share iPhone/iPad

You can share your iPhone or iPad with Meeting participants.

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

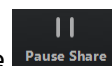
1. To share your iPhone or iPad in a Meeting, tap the *Share Screen* icon



2. Select **iPhone/iPad** as highlighted above.
3. Tap *Share* to see instructions for connecting to Airplay. Note: if you are prompted to allow `Airhost.exe` to install, select **Yes**.



4. Follow the instructions provided to connect your iOS device.
 - Swipe up from the bottom on your device to bring up the menu.
 - Tap *AirPlay* and select the Meeting option.
 - Turn on **Mirroring**.
5. You are now sharing your iPhone/iPad screen. You and your Meeting participants can see the iPhone/iPad screen in the Meeting client.
6. To pause the screen, tap the *Pause Share* icon at the top of the screen. Other participants see a snapshot of the screen that was being shared when *Pause Share* button was selected.



Participants continue to see this view until you select either the *Resume Share*



icon or the *Stop Share*



icon.

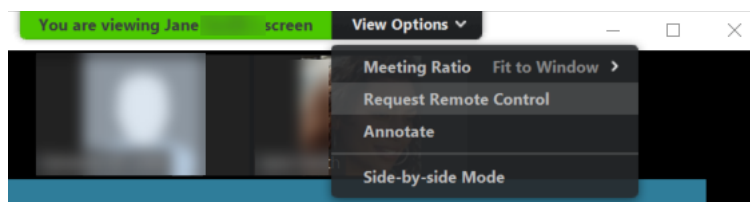
7. To stop sharing your iPhone or iPad tap the *Stop Share*  icon.

5.5 Request or give desktop Remote Control

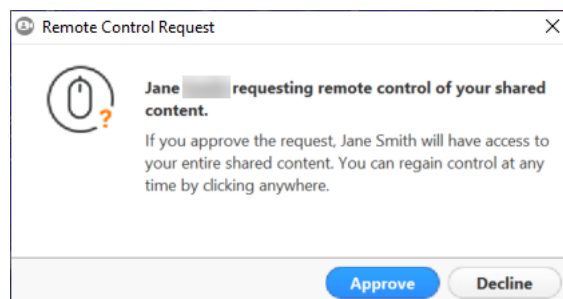
5.5.1 Request desktop control

While another participant is sharing their screen, you can request control of their mouse and keyboard.

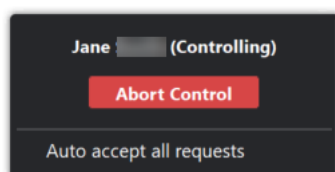
1. Once the user has started sharing, locate the tool bar menu drop down at the top middle of your in-meeting window - as illustrated by **You are viewing Jane's screen** below.



2. Select *Request Remote Control*. This sends a notification to the host or participant who is currently sharing their screen asking them to allow you to control their screen.



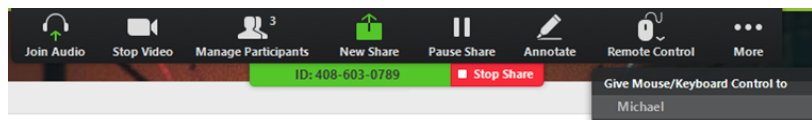
3. To relinquish control, click *Abort Control* in the pop-up window that appears while you are controlling a screen.



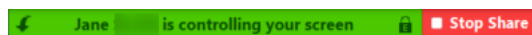
5.5.2 Give desktop control

While sharing your desktop, you can give another participant control of your mouse and keyboard. To give desktop control:

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.



4. When the other participant has taken control, you can see the following message.




6 Use Meeting Chat

Meeting has a chat function that is separate from the chat service that you may have on MaX UC Desktop or Mobile. The Meeting chat service allows all Meeting participants (even those outside of your business group) to send and receive chat messages.

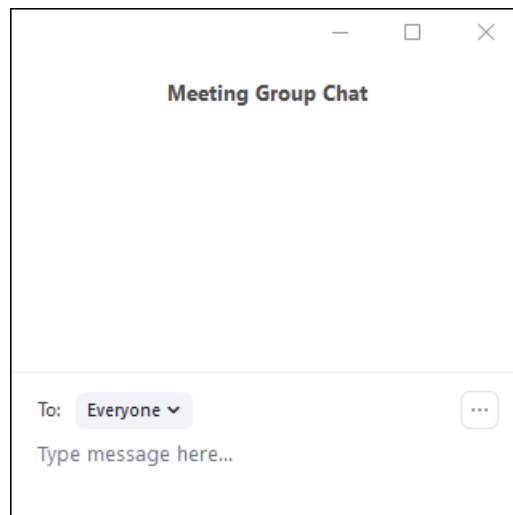
6.1 Use public and private Chat

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 icon*  on the bottom menu bar.

The **Meeting Group Chat** window opens as shown below.




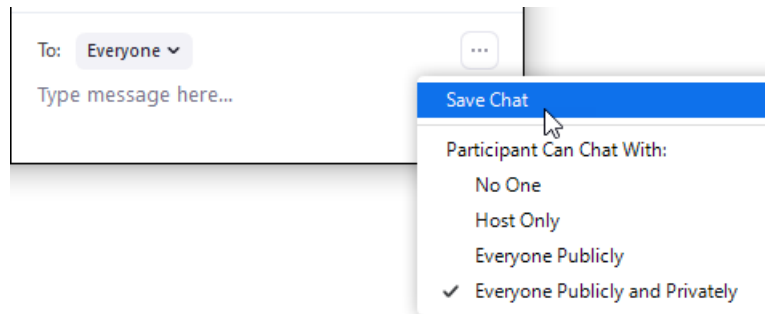
- To send a chat message to all participants in the Meeting, set the **To:** field to *Everyone*.
- To send a private message to one individual participant, select the participant's name from the dropdown list using the arrow alongside **Everyone**. To send a private message, you must have enabled Private Chat in your Meeting settings, as described in 10.3.2, In Meeting (Basic).
- Type your message in the space at the bottom of the screen and press **Enter**.

6.2 Save Chat logs

You can set up Meeting to automatically save your chat logs, as described in section 10.3.2, In Meeting (Basic), or save them on an individual basis.

You can also save your chat log as shown below.


1. Click the *More* icon  at the right-hand side of the chat window.
2. Select *Save Chat*.





6.3 Host Chat controls

A Meeting host can control whether chat is enabled and with whom Meeting participants can chat.

To enable or disable chat:

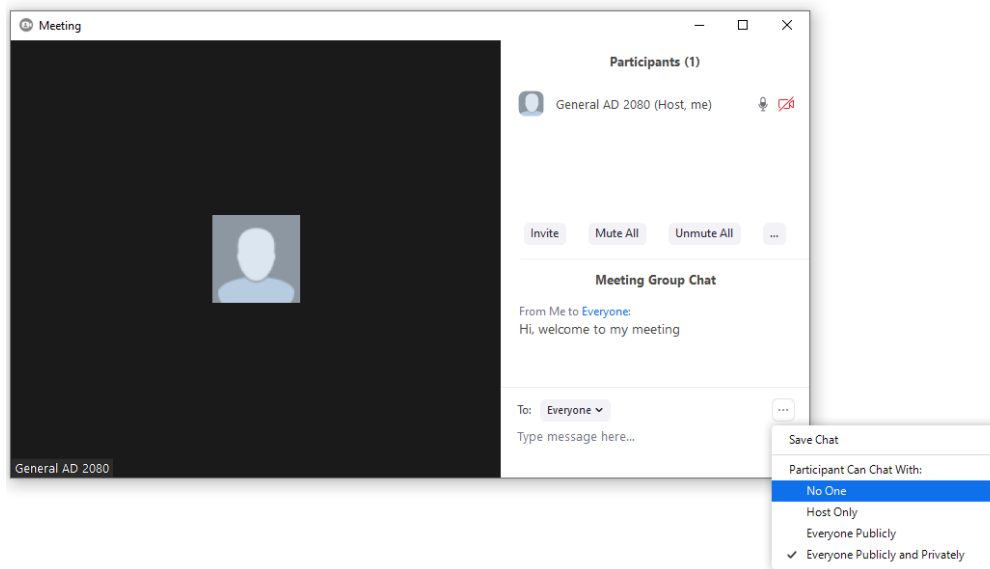
1. Click the *Security* icon  at the bottom of the Meeting screen.
2. Click *Chat* to toggle whether participants can chat. If a tick appears by Chat, then chat is enabled.

To set Chat accessibility for all Meeting participants:

1. Click the *Chat* icon  at the bottom of the Meeting screen.
2. Click the *More* icon  at the right-hand side of the chat window.


3. Select one of the following **Participant Can Chat With** options.

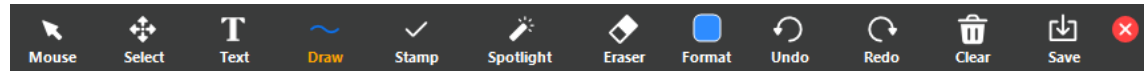
- *No One* – disables participants cannot chat with other Meeting participants.
- *Host Only* – Meeting participants can chat with the Meeting host only.
- *Everyone Publicly* – Meeting participants can chat with all other Meeting participants using the public chat window.
- *Everyone Publicly and Privately* – Meeting participants can chat with all other Meeting participants both privately and using the public chat window, but private messages are not enabled.



7 Use Annotation Tools

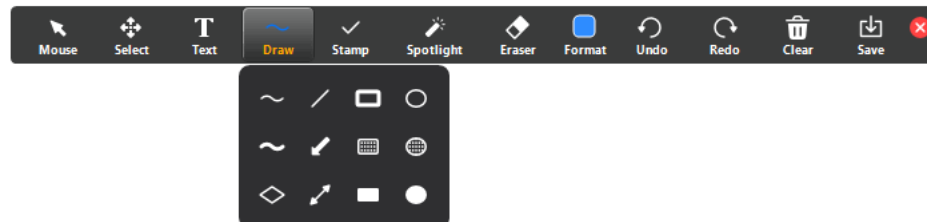
When sharing a screen, application or whiteboard, there are numerous **Annotation Tools** available for the host and participants to use.

While you are sharing content, click the *Annotate* icon  on the top toolbar to access the **Annotation Toolbar**.

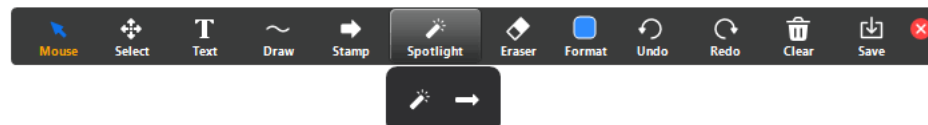


The following tools are available on the Annotation Toolbar.

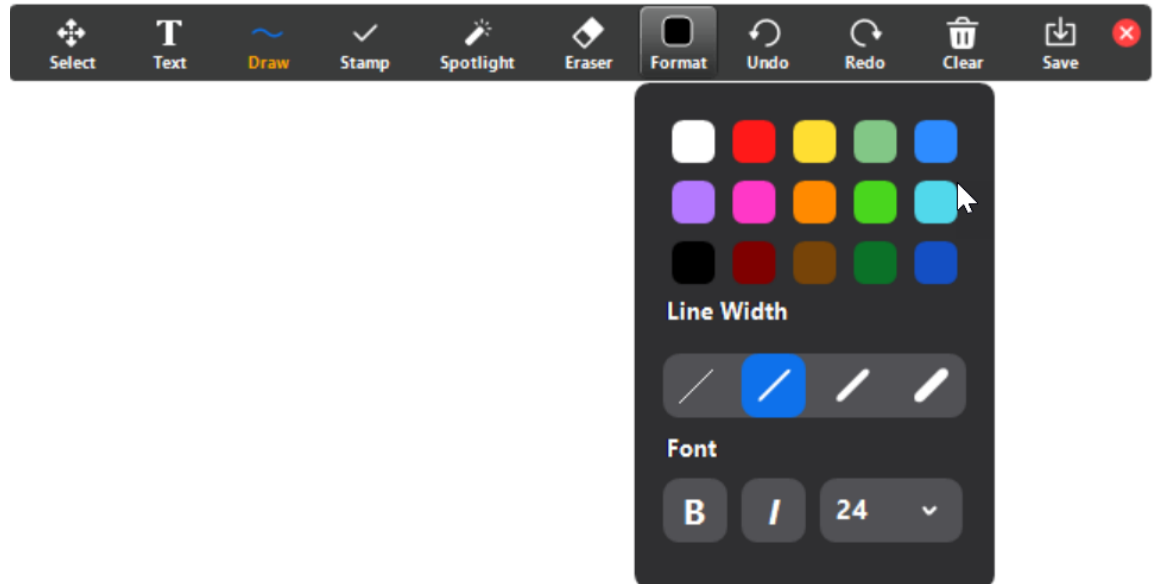
- *Mouse*. Allows you to move the cursor.
- *Select*. Allows you to select an area on the screen by clicking and dragging the mouse pointer across the screen.
- *Text*. Allows you to insert a text box on the screen by clicking and dragging the mouse pointer across the screen. Once you have drawn the text box, you can enter your text by typing in the box.
- *Draw*. Provides a range of drawing tools that you can select and use to annotate shared screens or whiteboards.



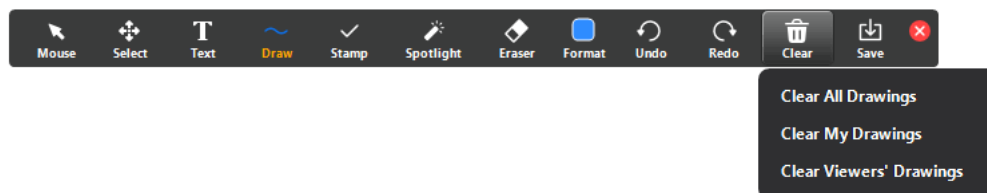
- *Stamp*. Provides a set of stamps that you can select and use to annotate shared screens or whiteboards.
- *Spotlight*. Provides an arrow or a red dot that you can use to point to a particular spot in the document or whiteboard that is visible to all participants.



- *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 Record 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 10.3.4, 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 or participant's local or network storage device. After the meeting has ended and the recording is successfully converted, a file explorer window containing the recording file automatically opens.

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 looks different.

You can replay a Meeting recording from MaX UC Desktop by selecting *Meetings > View Recorded Meetings* 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 Manage Meeting participants

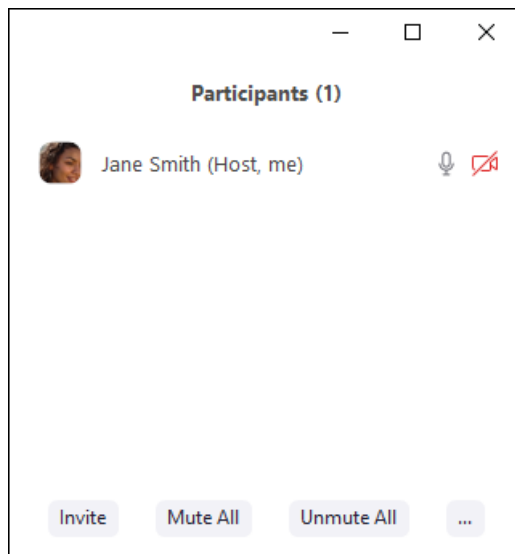
The Meeting host can manage all Meeting participants.

9.1 Host participant controls

The Meeting Host has control over all functions and features in the Meeting. If you are the Meeting host, you can access the participant controls by clicking on the

Participants icon  located on the bottom toolbar.

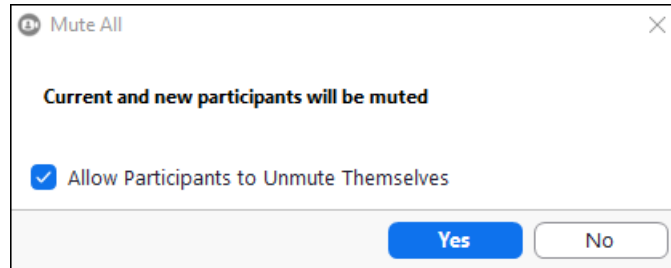
The **Participants** window opens as shown below.



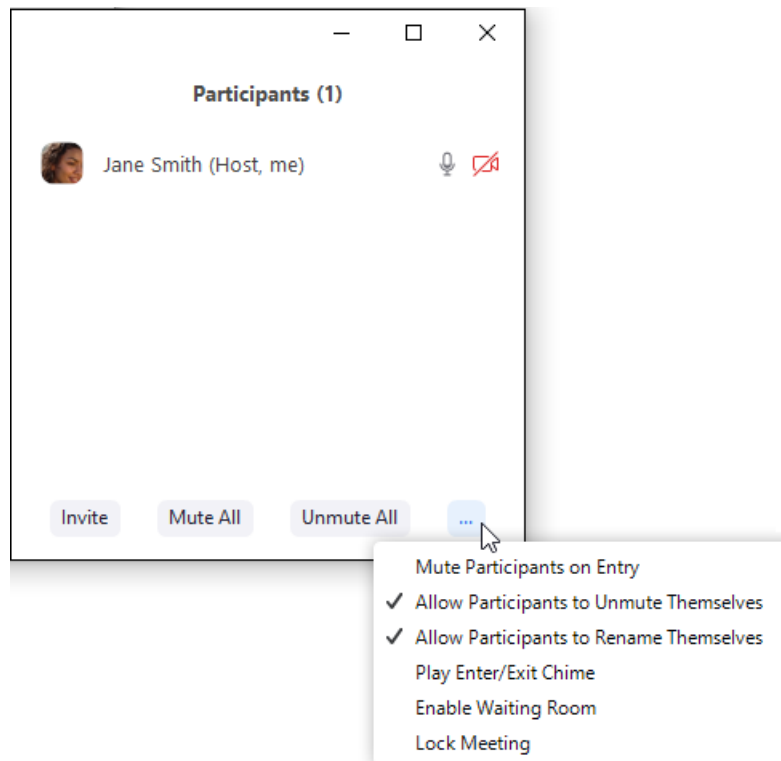
The **Participants** window lists all the participants currently in the Meeting, displays whether participants are currently muted or sending video, and contains a range of configuration options.

- *Invite*. Invite additional people to the Meeting.

- **Mute All.** This option opens a **Mute All** pop-up window. If you want to allow participants to unmute themselves, tick the box next to **Allow Participants to Unmute themselves**. Click Yes to mute all participants in the Meeting.



- **Unmute All.** This unmutes all participants in the Meeting.
- Click on the **More** icon (...) in the **Participants** window to access the following options, which apply to all Meeting participants.

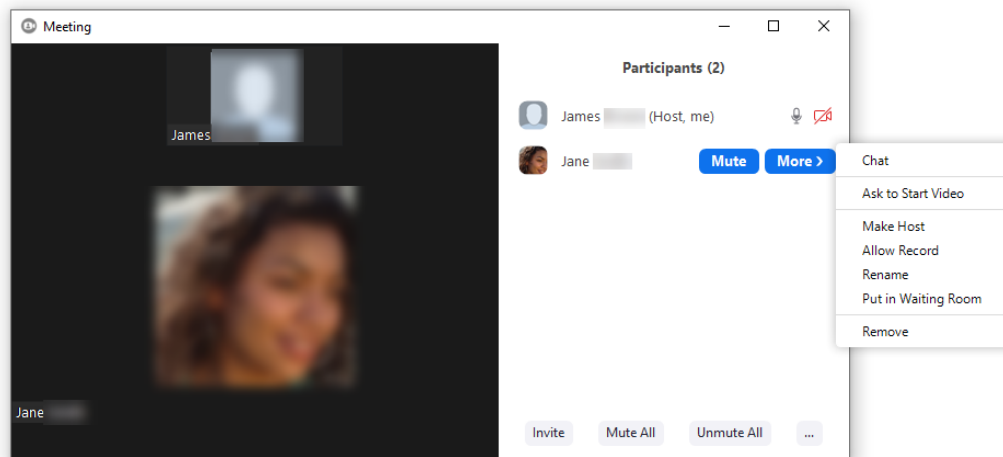


- **Mute Participants on Entry.** Participants are automatically muted as they enter the Meeting.
- **Allow Participants to Unmute Themselves.** Participants can unmute themselves during the Meeting.
- **Allow Participants to Rename Themselves.** Participants can rename themselves during the Meeting.
- **Play Enter/Exit Chime.** Plays a sound as participants join and leave the Meeting.

- *Enable Waiting Room.* If this is enabled, participants are put in a waiting room and you must explicitly admit them to the Meeting.
- *Lock Meeting.* Locks the Meeting so that no other participants can join.

The following options apply to individual participants.

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.

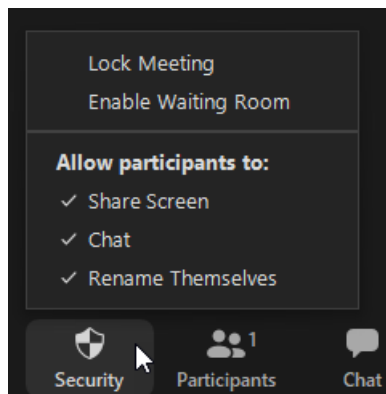
- *Stop/Ask to Start Video.* Stops a participant's video stream or sends a request to a participant to start their video.
- *Make Host.* Grants another participant permission to be the host of the Meeting - the original Meeting host can use the *Reclaim Host* option to become the host of the Meeting again.
- *Make Co-host.* Makes a participant a co-host. You can promote multiple participants to be co-hosts. Co-hosts see most of the configuration options available to the Meeting host, as follows. Note that a co-host cannot end the Meeting or make another participant the Meeting host.
- *Mute All/Unmute All.* Mutes or unmutes all participants in Meeting. When selecting this option, you 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.

- *Put in Waiting Room.* Removes a participant from the Meeting and places them in the Waiting Room.
- *Lock Meeting.* Locks the Meeting so that no other participants may join
- *Lock Screen Share.* Stops other participants sharing their screens.
- *Stop Participant's Sharing.* If a participant is screen sharing, the host can stop the screen share if required.
- *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
- *Allow Record.* Allows other participants to record the Meeting, as described in 8, Record 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 can also toggle many of the participant features by clicking on the *Security* icon



located on the bottom toolbar.



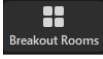
9.2 Manage video Breakout Rooms

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

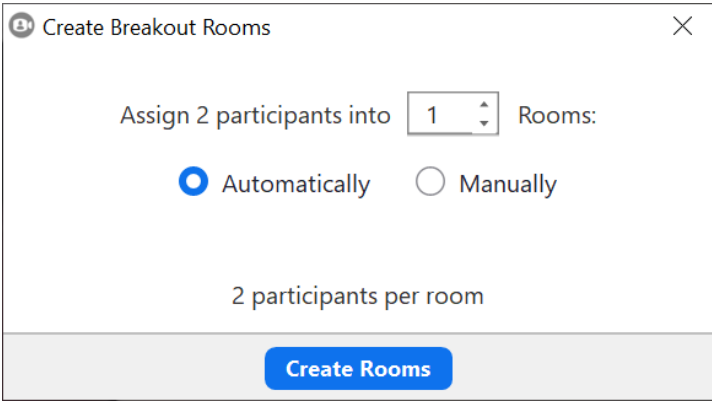
The Meeting host can choose to split the participants of the Meeting into these separate rooms automatically or manually and can switch between rooms at any time. A Meeting host can create up to 50 breakout rooms, with a maximum of 200 participants in a room (if you have the Large Meeting 200 add-on license described in section 1.2, Large Meetings (add-on licenses)).

Breakout rooms must be enabled in the **In Meeting (Advanced)** settings, described in section 10.3, 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 Create video Breakout Rooms

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

1. Use the pop-up to select the number of Breakout Rooms you want to create and how you would like to assign your participants to the Breakout Rooms.
 - *Automatically.* Meeting splits your participants up evenly into each of the Breakout Rooms.
 - *Manually.* Choose which participants you want in each Breakout Room.



The dialog box titled "Create Breakout Rooms" contains the following elements:

- A close button (X) in the top right corner.
- A label "Assign 2 participants into" followed by a numeric input field containing "1" and a "Rooms:" label.
- Two radio buttons: "Automatically" (selected) and "Manually".
- A label "2 participants per room" centered below the radio buttons.
- A blue "Create Rooms" button at the bottom.

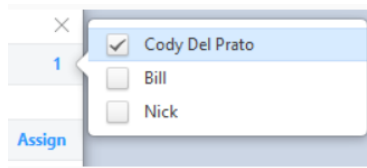
2. Click *Create Rooms*. Your Breakout Rooms are created but do not start automatically. Once you have created your Rooms, you can manage the Breakout Rooms prior to starting them, as described below.

9.2.2 Assign participants to a Breakout Room

To assign participants to your Breakout Rooms:

1. Select *Assign* next to the Breakout Room to which you wish to assign participants.
2. Select the checkbox next to each participant you wish to assign to that Breakout Room.
3. Repeat this for each Breakout Room.

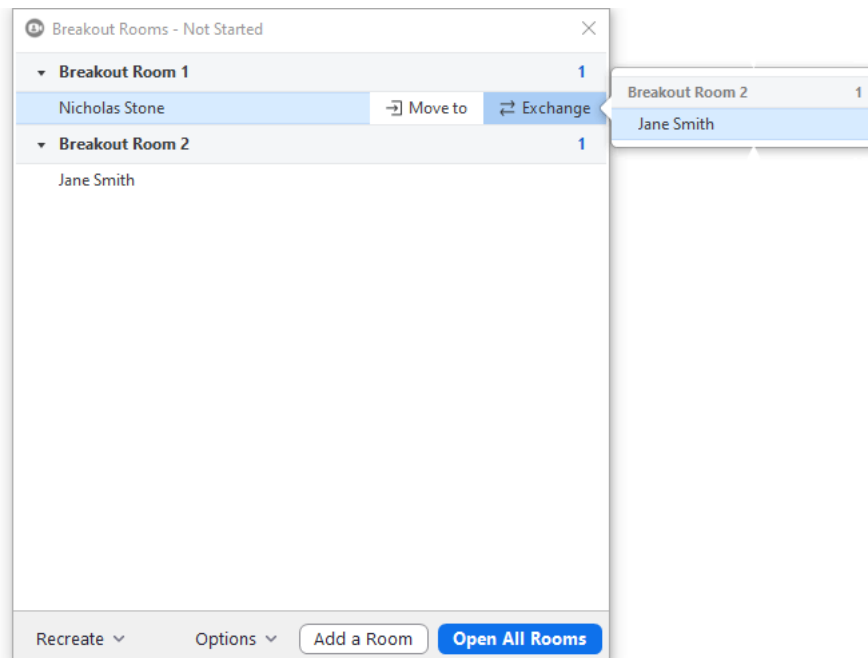
Once a participant has been assigned (manually or automatically), the number of participants is displayed in place of the *Assign* button.



9.2.3 Prepare Breakout Rooms

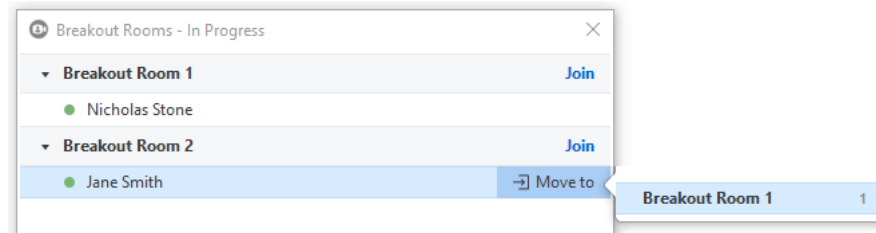
If you automatically assigned participants to Breakout Rooms, your Breakout Rooms appear with the participants assigned evenly across your rooms.

If you chose to manually assign participants or want to make changes, you can do so before starting the Breakout Rooms. Participants who are not assigned to a Breakout Room remain in the main Meeting when the Breakout Rooms start.

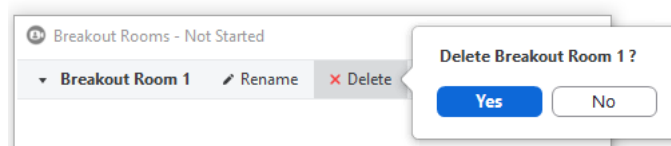


You can use the following options on the Breakout Rooms screen before starting the rooms.

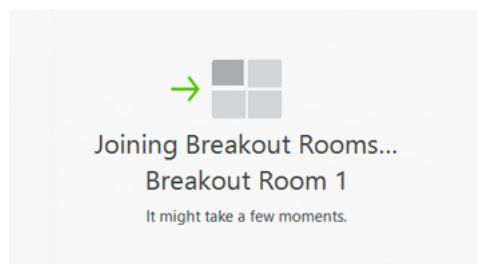
- *Move to (participant)*. Select the Breakout Room to which you wish to move the participant.



- *Delete Room*. Deletes the selected Breakout Room.

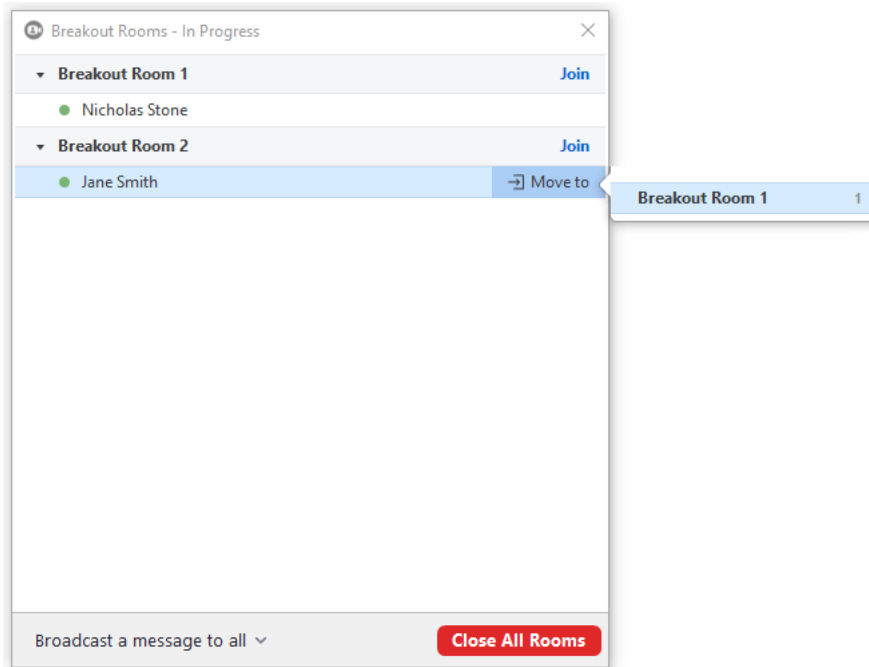


- *Recreate*. Starts the Breakout Room creation from scratch.
- *Add a Room*. Adds another Breakout Room.
- *Open All Rooms*. Starts the Breakout Room.
- All participants are moved to their respective Breakout Rooms after confirming the prompt to join the Breakout Room. The host is left in the main Meeting until manually joining one of the Breakout Rooms. The participants (and the host when manually joining a room) see the message shown below when they are moved to a Breakout Room.



9.2.4 Manage Breakout Rooms – in progress

Once the Breakout Rooms start, participants are asked to join the Breakout Room to which they have been assigned. The host stays in the main Meeting until joining a room manually. If a participant has not yet joined the room, the host sees **(not joined)** next to the participant's name.

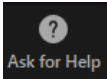


The host has the following options while the Breakout Rooms are in progress:

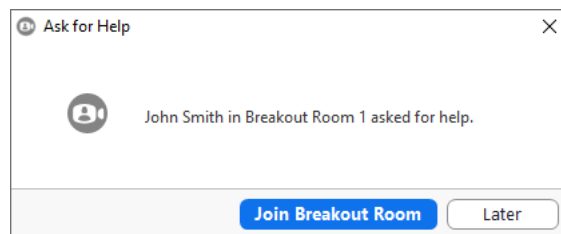
- *Join room.* Allows the host to join the Breakout Room selected
- *Leave room.* Allows the host to leave the room and return to the main meeting (only shows when in a Breakout Room)
- *Close All Rooms.* Stops all Breakout Rooms after a 30 second countdown, shown to the host and participants, and returns all participants back to the main Meeting.
- The host can also rename any Breakout Rooms, broadcast a message to all rooms, and move users between rooms using the options described in 9.2.3, Prepare Breakout Rooms.

9.2.5 Ask for Help

Breakout Room participants can request that the Meeting host join their Breakout

Room by clicking on the *Ask for Help* icon  on the Meeting menu bar.

The Meeting host is prompted to join the Breakout Room from which the request originated by clicking *Join Breakout Room*.

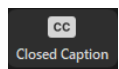


9.3 Closed Captions

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

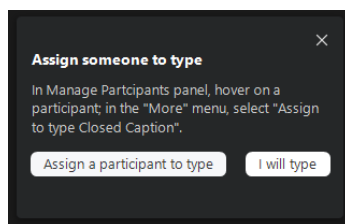
You must enable Closed captions in the **In Meeting (Advanced)** user settings, as described 10.3, Advanced Settings.

- To use closed captions while in a Meeting, click on the *Closed Caption* icon



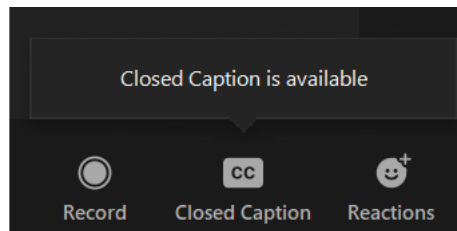
on the Meeting menu bar.

- Select either *I will type* to type the captioning yourself or *Assign a participant to type* to select another participant to type.



- You can then right-click on a participant in the **Participants Panel** and select *Assign to type Closed Caption*.

- The participant receives a **Closed Caption is available** notification in their menu bar.




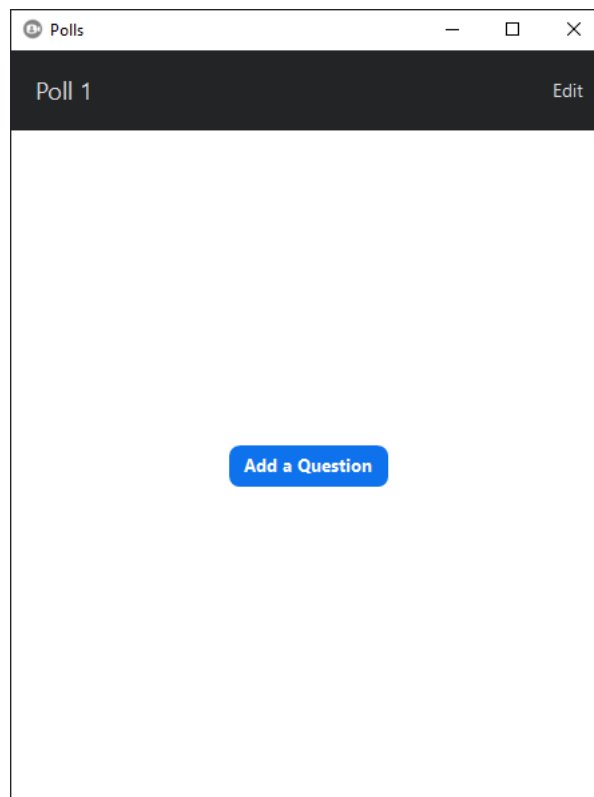
- After receiving the notification, the participant can click on the *Closed Caption* icon to see the Closed Captions as they are entered into the Closed Captions panel.

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 10.3, Advanced Settings.

- To create a poll for an upcoming Meeting, click the *Polls* icon  in the menu bar. The following pop-up appears.



- Clicking *Edit* or *Add a question* redirects you to a browser window where you can edit the poll.

Add a Poll ×

Enter a title for this poll.

☐ Anonymous? ⓘ

1.

Type your question here.

☒ Single Choice ☐ Multiple Choice

Answer 1

Answer 2

Answer 3 (Optional)

Answer 4 (Optional)

Answer 5 (Optional)

Answer 6 (Optional)

Answer 7 (Optional)

Answer 8 (Optional)

Answer 9 (Optional)


Answer 10 (Optional)

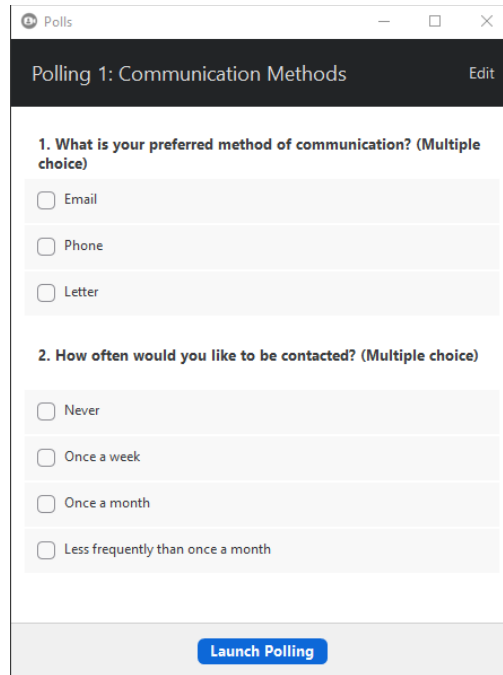
Delete

+ Add a Question

Save Cancel

- You can add a title for the poll and create several questions that have either single-choice or multiple-choice responses.
- You can choose whether participant responses are anonymized by selecting/deselecting the **Anonymous** checkbox.
- Once you have created the poll, click *Save*. You then see a screen where you can assign the poll to a specific Meeting.

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



Polls

Polling 1: Communication Methods Edit

1. What is your preferred method of communication? (Multiple choice)

☐ Email

☐ Phone

☐ Letter

2. How often would you like to be contacted? (Multiple choice)

☐ Never

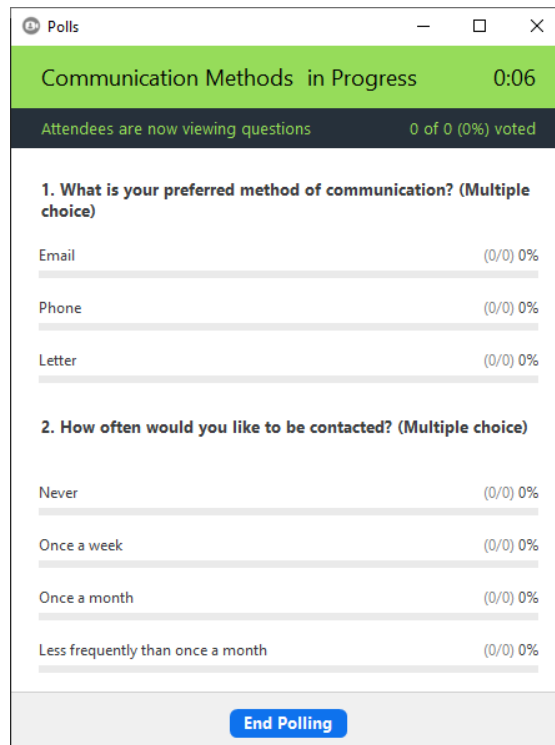
☐ Once a week

☐ Once a month

☐ Less frequently than once a month

[Launch Polling](#)

- You can see the results as participants respond to the poll.



Polls

Communication Methods in Progress 0:06

Attendees are now viewing questions 0 of 0 (0%) voted

1. What is your preferred method of communication? (Multiple choice)

Email (0/0) 0%

Phone (0/0) 0%

Letter (0/0) 0%

2. How often would you like to be contacted? (Multiple choice)

Never (0/0) 0%

Once a week (0/0) 0%

Once a month (0/0) 0%

Less frequently than once a month (0/0) 0%

[End Polling](#)

- Click *End Polling* when you want to stop the poll.
- Click *Share Results* to display the results to Meeting 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.

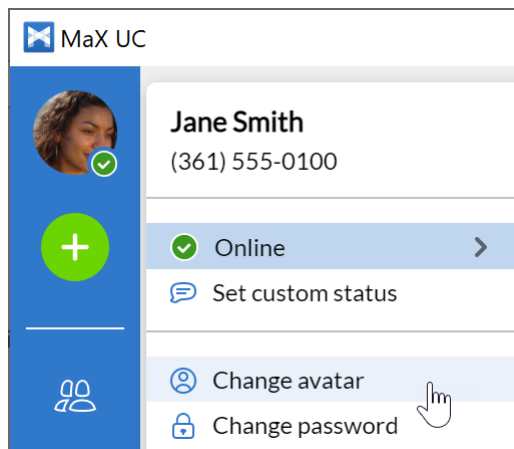
10 Meeting settings

You can use the MaX UC Desktop UI to customize Meeting to best suit your preferences. This section describes each of the customization settings.

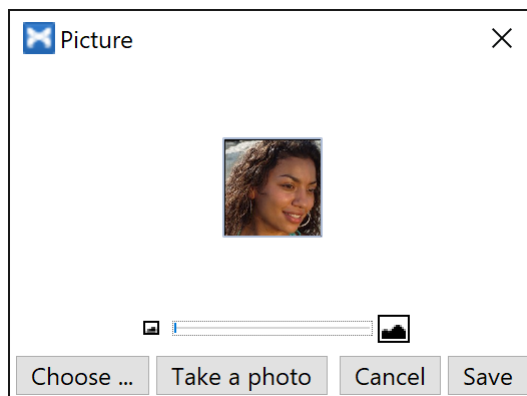
10.1 Set your Meeting avatar

The avatar that is shown to others in Meeting when you have video turned off is set on the MaX UC Desktop UI.

To update your avatar, click on the MaX UC Desktop avatar and select *Change avatar*.



In the Picture window that appears:



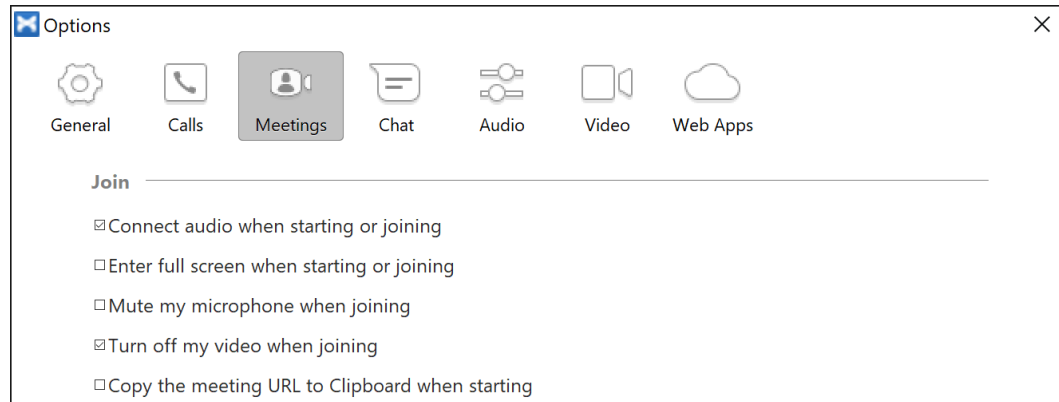
- Click *Choose...* to select an image on your computer.
- Click *Take a photo* to use your webcam to take a picture.

10.2 MaX UC Desktop Meeting settings

To access the settings below, select your avatar on the MaX UC Desktop UI and select *Settings*. In the *Options* window that appears, select the *Meetings* tab.

10.2.1 Join settings

The settings under the **Join** heading control how you connect to Meetings.



Tick the options that you want to use.

- *Connect to audio when starting or joining.* Connect to audio via your computer when you start or join a Meeting.
- *Enter full screen when starting or joining.* Enter Meetings in full-screen mode. You can exit full-screen mode at any time by pressing the **Esc** key on your keyboard.
- *Mute my microphone when joining.* Enter Meetings with your microphone on mute. To unmute, you can either click on the *mute* icon on the Meeting menu bar located at bottom of your screen or press **Alt + a** on your keyboard.
- *Turn off my video when joining.* Enter Meetings with your video disabled. To enable your video, click the *Start Video* icon located at the bottom-left of the Meeting menu bar.
- *Copy the meeting URL to the Clipboard when starting.* Always copy the Meeting URL to the clipboard. When enabled, you can then paste the URL into an email or IM to invite others to the current Meeting.

10.2.2 Scheduling & Invites

If your system does not support Scheduling Assistants, this panel is called the **Invites** panel.

The settings under the *Scheduling & Invites* heading cover email invitations and, where supported, configuring Scheduling Assistants.

Scheduling & Invites

Dial-in numbers: [Redacted]

Email invitation: [Edit](#) English (United Kingdom) ▾

Changing the email language will not affect custom messages.

Scheduling Assistants: [Empty List] [Add Assistant](#)

A scheduling assistant can schedule meetings on your behalf.

- **Dial-in numbers** are used by participants to dial into Meetings and are set by your Service Provider (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.

Edit Email Template [Close]

Subject
Meeting Invite

Message
Metaswitch invites you to attend this Meeting.

Your custom email template will be used when creating meetings from MaX UC Dev.
Scheduled meetings will continue to use the default email template.
Meeting information is added to the end of the email and is not editable.

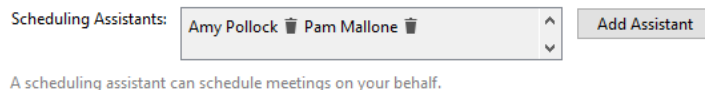
[Reset to Default](#) [Preview](#) [Save](#) [Cancel](#)

- **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 is only shown in the language in which it was written.*
- **Preview.** Shows an example of what your email invitations 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.

Scheduling Assistants

If your system supports nominating one or more of your contacts as Scheduling Assistants who can set up Meetings on your behalf, you can see options to add or change your scheduling assistants.



- *Scheduling Assistants.* Displays any assistants already configured. Use the *trash can* symbol to delete an assistant (this only deletes the contact from being a Scheduling Assistant and does not remove them from your contacts).
- *Add Assistant.* Enables you to select a Scheduling Assistant from a pop-list of your contacts. Scheduling assistants must be in your Business Group and must be able to use Meeting. You will see an error message if you select a contact who does not satisfy these criteria.

10.2.3 Meeting settings

The settings under the **Meeting** heading control how specific Meeting items operate. Tick the items that you want to use.

Meeting

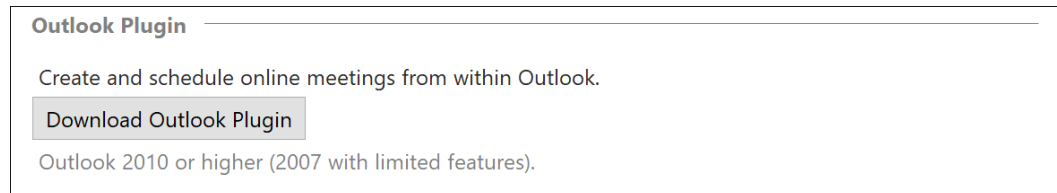
☐ Enter full screen when viewing the shared screen
☒ Scale the shared screen to fit window
☐ Hide non-video participants
☒ Confirm before leaving meetings
☐ Use dual monitors

- *Enter full screen when viewing the shared screen.* Places you into full screen mode when viewing another's shared screen.
- *Scale the shared screen to fit the window.* The shared screen is sized to fit the current viewing area.
- *Hide non-video participants.* Do not display dialing users in the video gallery. When non-video participants are hidden, you can still hear their audio and see them in the Participants panel.
- *Confirm before leaving meeting.* The system confirms that you want to leave the Meeting before allowing you to exit.

- *Use Dual Monitors.* The system allows you to select a second monitor screen to share 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.

10.2.4 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 3.2.1, Download and install the Outlook Plugin.



10.3 Advanced Settings

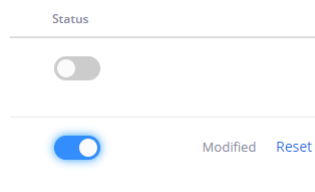
You can carry out a more granular customization of your Meeting experience in *Advanced Settings*.

To access Advanced Settings, select your avatar on the MaX UC Desktop UI and selecting *Settings*. In the *Options* window that appears, select the *Meetings* tab then select the *Advanced Settings* button.

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

- **Meeting**, described in the following sections.
 - 10.3.1, Schedule Meeting.
 - 10.3.2, In Meeting (Basic).
 - 10.3.3, In Meeting (Advanced).
- **Recording**, described in 10.3.4, Recording settings.
- **Telephone**, described in 10.3.5, 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 the setting, mouse over and move the slider. You can 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 can 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 currently is.
- You cannot change a setting that is grayed out. For example, some settings may be locked by your telephone system administration.

10.3.1 Schedule Meeting

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

Schedule Meeting

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 participants 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 Meeting ID (PMI)

☒

Embed password in meeting link for one-click join

Meeting password will be encrypted and included in the join meeting link to allow participants to join with just one click without having to enter the password.

☒

Require password for participants joining by phone

A numeric password will be required for participants joining by phone if your meeting has a password. For meeting with an alphanumeric password, a numeric version will be generated.

☒

Mute participants upon entry

Automatically mute all participants when they join the meeting. The host controls whether participants can 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, Schedule a Meeting.

10.3.2 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 are grayed out if you cannot change the setting.



SIGN OUT

In Meeting (Basic)

Enable enhanced encryption for meetings

Meeting are always encrypted. Enhanced encryption uses AES-256-GCM, compatible with Meeting 5.0.0 and later.



Require encryption for 3rd party endpoints (SIP/H.323)

By default, Meeting requires encryption for all data transferred between the Meeting cloud, Meeting client, and Meeting Room. Turn on this setting to require encryption for 3rd party endpoints (SIP/H.323) as well.



Chat

Allow meeting participants to send a message visible to all participants



☐ Prevent participants from saving chat

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.



Screen sharing

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



Who can share?

☐ Host Only ☒ All Participants [?](#)

Who can start sharing when someone else is sharing?

☒ Host Only ☐ All Participants [?](#)

Disable desktop/screen share for users

Disable desktop or screen share in a meeting and only allow sharing of selected applications.



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.



Allow removed participants to rejoin

Allows previously removed meeting participants and webinar panelists to rejoin



Allow participants to rename themselves

Allow meeting participants and webinar panelists to rename themselves.



Hide participant profile pictures in a meeting

All participant profile pictures will be hidden and only the names of participants will be displayed on the video screen. Participants will not be able to update their profile pictures in the meeting.



- *Enable enhanced encryption.* Requires encryption for all Meetings. 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 Enhanced Encryption, all traffic is encrypted as follows.
 - Signaling uses SIPS (i.e. SIP over TLS).
 - Media uses AES 256 encryption.
 - When Enhanced Encryption is enabled, devices that cannot support SIPS and AES 256 encryption are not allowed to dial into Meetings. If users do not enable Enhanced Encryption, all traffic (both signaling and media) is unencrypted.
- *Require encryption for 3rd party endpoints (SIP/H.323).* When enabled, all third-party endpoints must be encrypted to dial into Meetings.
- *Chat.* Enables the **Meeting chat to everyone** function (this is enabled by default).
- *Prevent participant from saving chat.* Prevents Meeting participants saving Meeting chat logs.
- *Private chat.* Meeting participants can 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.* Plays a chime when a participant enters or exits the Meeting. You can also choose if only you hear the chime or if everyone in the meeting hears the chime.
- *Co-host.* When enabled, the Meeting host can make one or more participant a Co-host. See section 9.1, Host participant controls, for more information on co-host functions. You can only see this option if it has been enabled on your system.
- *Polling.* The Meeting host can create polls to use during Meetings.
- *Screen sharing.* Meeting participants can share the contents of one of their screens during a Meeting (see section 5, Share your Screen for more information).
 - *Who can share?* Controls whether only the host or all participants can share their screens during a Meeting.
 - *Who can start sharing when someone else is sharing?* Controls whether only the host or all participants can interrupt a screen share with their own screen share.

- *Allow host to put attendee on hold.* The Meeting host can place a participant on hold. When placed on hold the participant's video is stopped and they are muted. Other participants can see the user's avatar, if present, and that they are muted. The person on hold sees **You are on hold** on their screen and has no control in their client until they are taken off hold. You can only see this option if it has been enabled on your system.
- *Disable desktop/screen share for users.* Prevents Meeting participants from sharing their desktop screen. Meeting participants can share their screen when using select applications.

(Note: Meeting participants using MaX V.2.31 or earlier or a browser client are not affected by this option being enabled and are not prevented from sharing their desktop screen).

- *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.
- *Allow removed participants to rejoin.* Enables participants or Webinar panelists who have been removed from a Meeting to rejoin.
- *Allow participants to rename themselves.* Enables Meeting participants to change their names during a Meeting.
- *Hide participant profile pictures in a Meeting.* Hides the profile pictures of all Meeting participants; only the participant's names are displayed. Also prevents Meeting participants from editing or changing their profile pictures during a Meeting.

10.3.3 In Meeting (Advanced)

Use this section to modify the advanced features used in a Meeting.

In Meeting (Advanced)

Report participants to Meeting Hosts can report meeting participants for inappropriate behavior to Meeting's Trust and Safety team for review. This setting can be found on the Security icon on the meeting controls toolbar.	<input checked="" type="checkbox"/>
Breakout room Allow host to split meeting participants into separate, smaller rooms	<input type="checkbox"/>
Remote support Allow meeting host to provide 1:1 remote support to another participant	<input type="checkbox"/>
Closed captioning Allow host to type closed captions or assign a participant/third party device to add closed captions	<input type="checkbox"/>
Save Captions Allow participants to save fully closed captions or transcripts	<input type="checkbox"/>
Far end camera control Allow another user to take control of your camera during a meeting	<input type="checkbox"/>
Group HD video Activate higher quality video for host and participants. (This will use more bandwidth.)	<input type="checkbox"/>
Virtual background Allow users to replace their background with any selected image. Choose or upload an image in the Meeting Desktop application settings.	<input checked="" type="checkbox"/>
Waiting room When attendees join a meeting, place them in a waiting room and require the host to admit them individually. Enabling the waiting room automatically disables the setting for allowing attendees to join before host.	<input type="checkbox"/>
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	<input type="checkbox"/>

- **Breakout room.** Enables Breakout rooms. For more information, see section 9.1, Manage video Breakout Rooms. This option is 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 option 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, Closed Captions.
- **Saved captions.** Allows Meeting participants to save Meeting Closed Captions or transcripts.

- *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 Meeting host is the only user that can request far-end camera control.
- *Group HD video.* Enables HD video.
- *Virtual Background.* Users can upload images to use as their background during a Meeting if they enable video (see section 4.7, Enable Virtual Backgrounds).
- *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 supported browser, rather than having to download a client.
- *Direct call a room system.* Allows users to directly call a Breakout Room from their client.
- *Invitation Email.* Use the drop-down to select the language 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 ID randomly generated when you schedule a meeting. Click *Edit* if you want to change the PMID. 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 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 a PL.

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 cannot access the Meeting. 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.

10.3.4 Recording settings

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

The screenshot shows the 'Recording' settings page. At the top, there is a user profile icon and a 'SIGN OUT' button. Below this are three tabs: 'Meeting', 'Recording' (which is selected and underlined), and 'Telephone'. The 'Recording' section contains three settings, each with a toggle switch:

- Local recording**: Toggled on. Description: 'Allow hosts and participants to record the meeting to a local file'. Below this is a checked checkbox labeled 'Hosts can give participants the permission to record locally'.
- Automatic recording**: Toggled off. Description: 'Record meetings automatically as they start'.
- Recording disclaimer**: Toggled off. Description: 'Show a customizable disclaimer to participants before a recording starts'.

At the bottom, there is a summary section titled 'Recording' with two checkboxes: 'Local recording' (checked) and 'Automatic recording' (unchecked). Below these are two buttons: 'Save Changes' and 'Cancel'.

- *Local recording.* When enabled, participants can make local recordings of meetings.
- *Automatic recording.* When enabled, all Meetings are automatically recorded.
- *Recording disclaimer.* When enabled, a customizable disclaimer is shown to all Meeting participants before a recording begins.

10.3.5 Telephone

Use the **Telephone** tab to specify how international phone numbers are displayed in Meeting invitations.

Mask phone number in the participant list




Phone numbers of users dialing into a meeting will be masked in the participant list. For example:

888****666

Global Dial-in Countries/Regions

Click the Edit icon to choose countries/regions that frequently have participants who need to dial into meetings. The dial-in phone numbers of these locations appear in the email invitation, and can be used by participants dialing in from those locations.

United States of America 

- *Mask phone number in the participant list.* When enabled, the phone numbers of all users who are dialing into the Meeting are masked in the participant list.
- *Global Dial-in Countries/Regions.* When enabled, you can specify which international numbers appear in email invitations and in which order. Click the *Edit* symbol to change the settings.

A Supported SIP/H.323 Conference Room Systems

Meeting supports the following Conference Room Systems. See section 2.5.2, Add a SIP or H.323 Room System to your Meeting, for instructions on how to include a Room System in a Meeting.

A.1 Polycom Room Systems

- 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

Icon 600, 800

Express 220

Team 220

Room 220, 220i

A.3 Cisco/Tandberg Room Systems

Cisco SX10 and SX20

Cisco C20, C20 Plus, C40, C60, C90

Tandberg 880 MXP

Tandberg 6000 MXP

A.4 TelyHD Room Systems

Tely 200

TelyHD Pro

A.5 Aver Room Systems

EVC 900, 130, 130P, 100.

A.6 Huawei Room Systems

VP9030, VP9050, and TE30.

