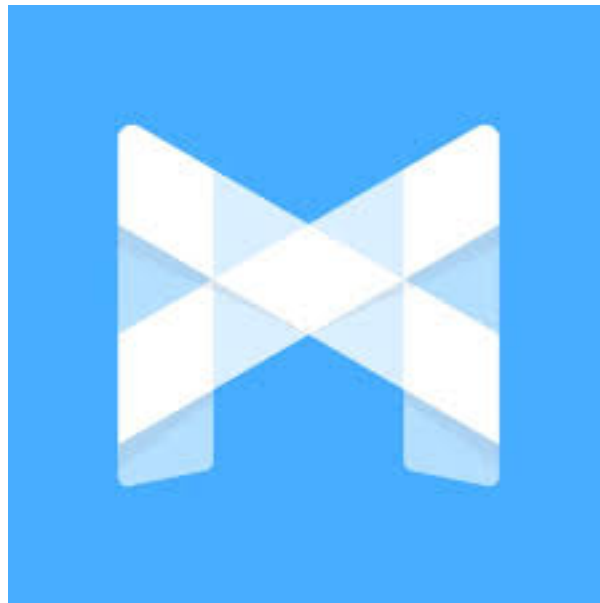




# MaX Meeting Feature User Guide



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# 1 Description

MaX Meeting is a full featured web and video conferencing service offered as a service hosted entirely from the cloud. MaX Meeting adds Web, Video and Audio-conferencing capabilities as both a fully integrated unified communications product and as a stand-alone product. Both the UC and the Stand-alone solutions provide support for 4, 10, 25, 100, 300 and 500 participants in a meeting, all with the ability to share their video, desktop annotate and more. Meetings larger than 500 move to MaX Webinar which can support up to 10,000 attendees.

This document describes how to use the features and function of MaX Meeting. Unless otherwise noted, each feature is supported by both the integrated UC and the Stand-alone solutions.

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## 2 Starting an Immediate MaX Meeting Collaboration Session

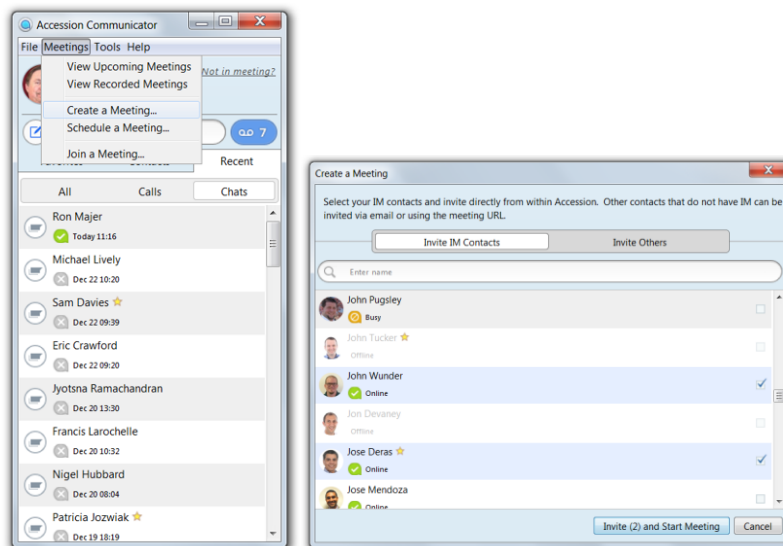
There are multiple methods available that a user might use to start an MaX Meeting collaboration session from MaX UC Desktop or MaX UC Mobile Client. This section describes how to start a meeting from each of the available methods.

NOTE: MaX Meeting Collaboration Sessions are only supported with integrated MaX Meeting Communicator deployments and are not supported with the Stand-Alone MaX Meeting Client.

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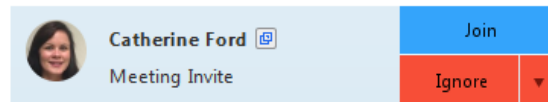
### 2.1 Start a Meeting from MaX UC Desktop Menu Bar

You can quickly and easily start a meeting on demand from MaX UC Desktop by clicking on the Meetings tool-bar then clicking “Create a Meeting”. This will launch the invite window where you will choose one or more people in your business group to invite to the meeting by clicking in the selection box on the right side of the window as shown below. Once you are finished selecting people to be invited to your meeting, click on the “Invite and Start Meeting” button in the lower right of the dialog window.



Note: You can only invite internal chat contacts using this method.

The people that you have selected to invite will receive an invitation via their MaX UC client like the one shown below.



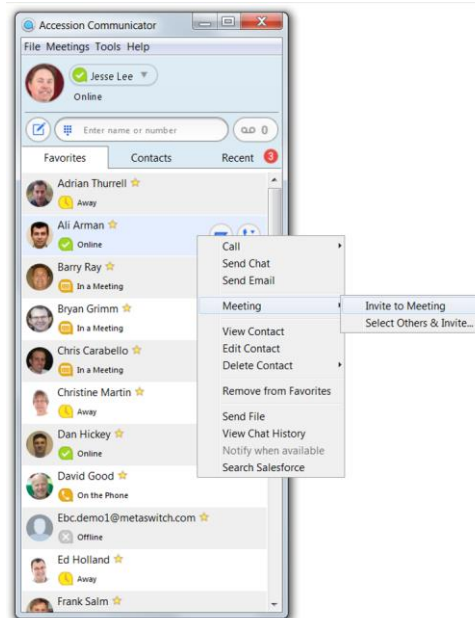
The people receiving the invite can choose to join the meeting by clicking the “Join” button on the invitation, or can choose to reject the invitation by clicking the “Reject” button. When rejecting an invitation, the users can do so with or without providing a reason for the rejection. If the user wants to send a reason why they are rejecting the meeting invite, they can click on the arrow next to the “Reject” button and will be presented with a list of predefined reasons that cannot attend a meeting at this time as shown below.



---

## 2.2 Start a Meeting from a Directory Entry

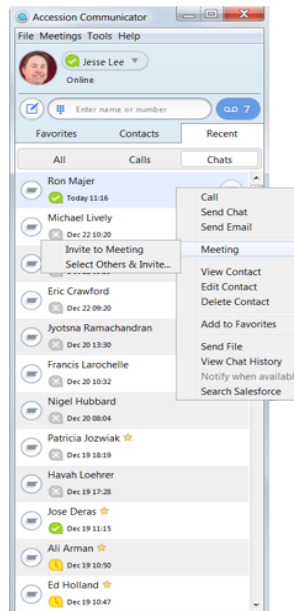
You can quickly invite a contact from within your business group to a MaX Meeting collaboration session by simply right clicking on an online contact and selecting “Invite to Meeting” as shown below.



---

## 2.3 Start a Meeting from Recent Calls/Chats


You can quickly invite a contact from within your business group to an MaX Meeting collaboration session from your recent calls or chat session by right clicking on a recent call or chat session and selecting “Invite to Meeting” as shown below.

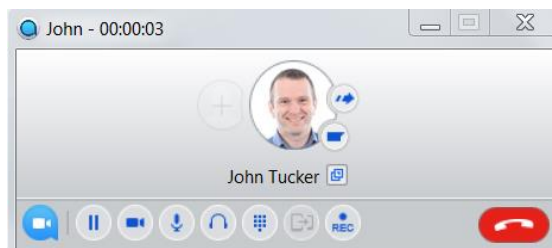


---

## 2.4 Uplift an MaX UC Desktop Call to a Meeting

While in a call with another MaX user within your business group, you can easily uplift from a voice call to an MaX Meeting collaboration session by clicking on the


MaX Meeting icon  in the lower left corner of the in-call dialog window as shown below and “select invite to meeting”.

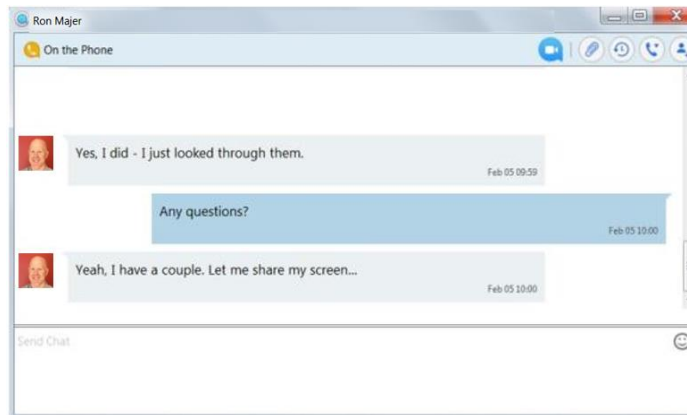


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## 2.5 Uplift a MaX Chat/Group Chat to a Meeting

While in a chat or group chat session you can easily uplift from a chat session to an MaX Meeting collaboration session by clicking on the MaX Meeting icon

 in the upper right corner of the chat session window and choosing “select invite to meeting” as shown below.




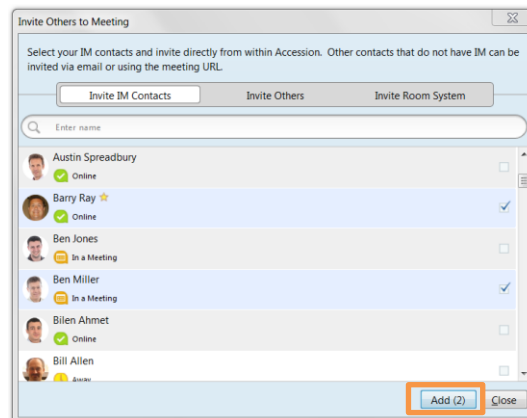
---

## 2.6 Inviting Additional Participants and Room Systems

### 2.6.1 Inviting Additional Participants

You can easily add additional people to your existing meeting by clicking on the “Invite”

button  in the menu bar at the bottom of your screen. Once selected, you will see a list of IM contacts. Select the people you wish to invite to your meeting by clicking the checkbox next to their name(s) and then clicking the “Add” button as highlighted below.

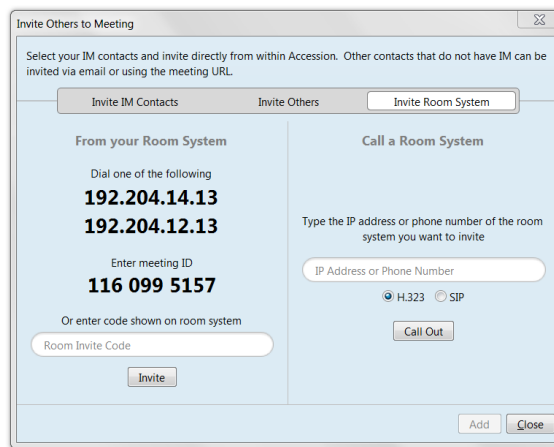




## 2.6.2 Adding a SIP or H.323 Room System to your Meeting

Once you have started your meeting, you can easily add a SIP or H.323 Room based conference system in one of two methods. The first is to dial out to the Room system using either the IP address or phone number of the conference room system. The participants using the conference room system will answer your call and be added into your MaX Meeting.

The second method is to provide the IP Address and Meeting ID to the participants joining from the Room System. They can then enter the IP address as shown in the example below. In this case the IP Address will be entered into the conference room system and the meeting ID entered when prompted.



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 won't be obvious whether the room system has successfully joined the meeting. This means the Create a Meeting dialog will never include the "Invite Room System" tab, because the dialog is only ever displayed before the meeting is joined. The email invite will still contain information about joining from a room system."

### On a H.323 device, you dial:

- The IP Address only, then enter 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
  - 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

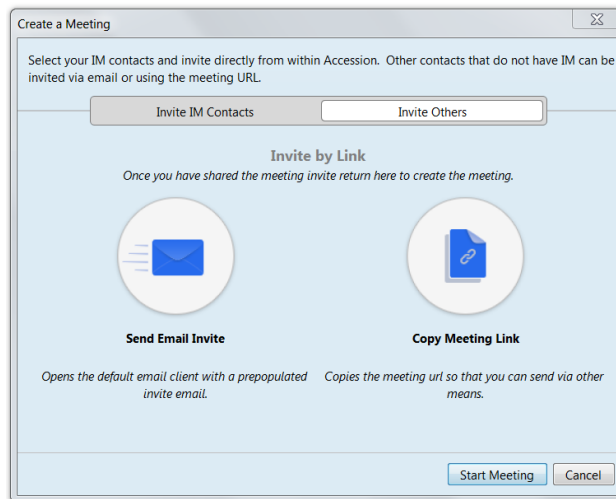
- The Meeting ID@IP Address, for example: [213746932@192.168.3.142](mailto:213746932@192.168.3.142)

## Supported SIP/H.323 Conference Room Systems

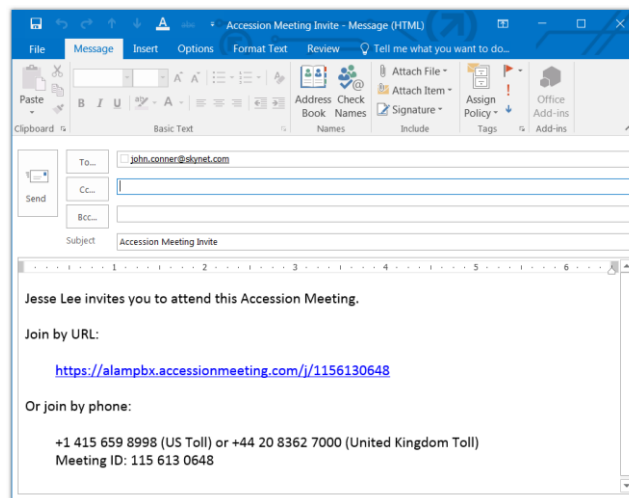
For a list of supported SIP and H.323 room systems supported by MaX Meeting see Appendix 10.6.4A Supported SIP/H.323 Conference Room Systems.

## 2.7 Start a MaX 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 tool-bar in MaX UC Desktop and then click “Create a Meeting”. This will launch the invite window, where you will select the “Invite Others” button and then click on the “Send Email Invite” button as shown below.



This will open a new email in your default email program with all of the information needed for people to join your meeting. You will need to fill in the email addresses of the contacts to receive the invite in the “To”: field of the email as shown below.



---

## 3 Scheduling a MaX Meeting

There are multiple methods for scheduling a MaX Meeting including using MaX UC Desktop, MaX UC Mobile, Outlook Calendar and or the Stand-Alone meeting client if the meeting credentials are sharable.

Note: Scheduling for stand-alone deployments are limited to the Stand-Alone client and Outlook Calendar.

---

### 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” and the schedule meeting dialog window will appear as shown below.

In the schedule meeting dialog, select the time and date for your meeting in the When section.

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

Audio Options allow you to select how participants can connect for the studio portion of the meeting.

Meeting Options allow you to:

- Set and require a password to be entered before a participant can enter a meeting
- Enable participants to join the meeting before you join the meeting

The Calendar section allows you to select the format for the invitation, including Outlook, Google and Other/Generic calendars.

The screenshot shows a dialog box titled "Accession Meeting - Schedule a Meeting". It has a "Topic" field containing "Jesse Lee's Accession Meeting". The "When" section includes a "Start" field set to "Wed, December 28, 2016" at "02:00 PM", a "Duration" field set to "1" hour and "0" minutes, and a "Time Zone" dropdown set to "(GMT-6:00) Central Standard Time". There is a checkbox for "Recurring meeting" which is unchecked. The "Video (when joining a meeting)" section has radio buttons for "Host" (set to "On") and "Participants" (set to "On"). The "Audio Options" section has radio buttons for "Telephone Only", "Voip Only", and "Both" (set to "Both"). The "Meeting Options" section has checkboxes for "Require meeting password" and "Enable join before host", both of which are unchecked. The "Calendar" section has radio buttons for "Outlook" (set to "Outlook"), "Google Calendar", and "Other Calendars". A blue "Schedule" button is at the bottom right.

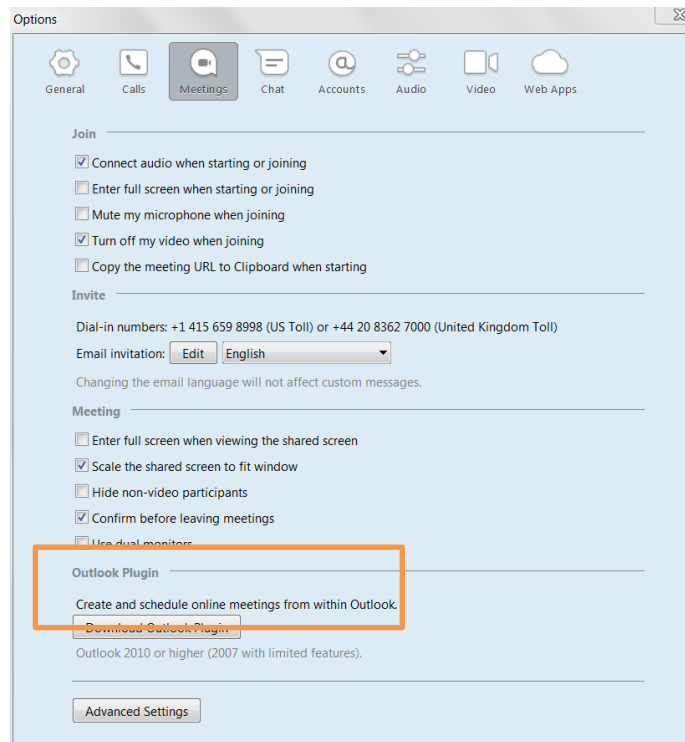
## 3.2 Schedule a Meeting from Outlook

MaX Meeting provides an Outlook plugin that can be used to schedule MaX Meetings from your Outlook calendar with one-click.

### 3.2.1 Downloading and Installing the Outlook Plugin

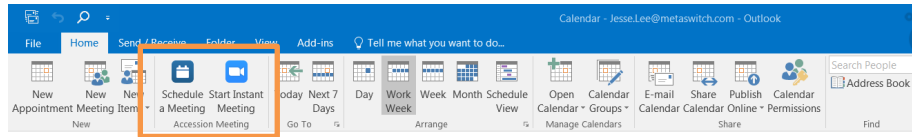
You can easily download the MaX calendar plugin from MaX UC Desktop by clicking on Tools -> Options -> Meetings. From the Meetings Options screen, select the large “Download Outlook Plugin” button toward the bottom of the screen as highlighted below.

- Once you click the “Download Outlook Plugin” button your default browser will open to download the file.
- You will be prompted to save the file, choose yes
- Open your downloaded files in your browser. You should see a file named AccessionMeetingOutlookPluginSetup.msi. or MaXMeetingOutlookPluginSetup.msi. Click or double click (as appropriate) to open the file.
- You will be prompted “Do you want to run this file”. Select Run and the install wizard will launch.
- Select next at the Welcome Screen
- At the Select Install Folder, accept the default install location by selecting Next
- Confirm installation by clicking Next and the install will begin. If you receive a message asking if you want to allow the program to install, select Yes.
- Once the installation is completed, click the Close Button

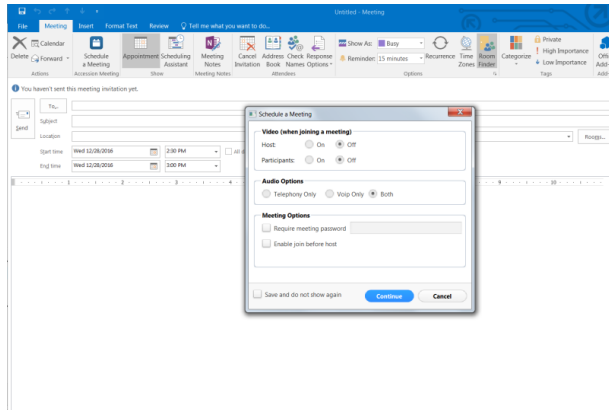


## 3.2.2 Schedule a Meeting Using Outlook Calendar

Now when you open Outlook Calendar you will see new icons on the toolbar for MaX Meeting as shown below.



You can now schedule an MaX Meeting by clicking on the “Schedule a Meeting” button and the following scheduling dialog window appears:



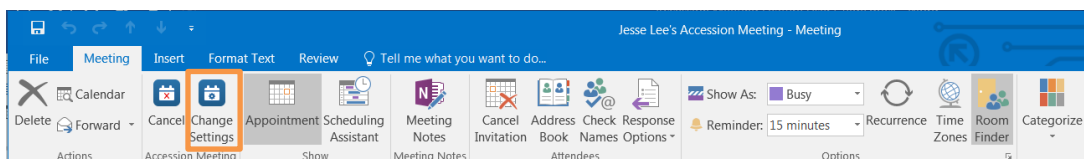
The Video (when joining a meeting) section allows you to set the default video settings for yourself and the participants. When on is selected, video will automatically be started when you join the meeting.

Audio Options allow you to select how participants can connect for the studio portion of the meeting.

Meeting Options allow you to:

- Set and require a password to be entered before a participant can enter a meeting
- Enable participants to join the meeting before you join the meeting

If these are the default setting you would like with all future meeting, then you can select the “Save and do not show again” button. Now the next time you schedule a meeting these setting will be uses and you will not see this screen. If you want to change these at any time, when you create a meeting select the “Change Settings” button from the MaX Meeting calendar toolbar as shown below:



### 3.2.3 Schedule a Teleconference Only Meeting

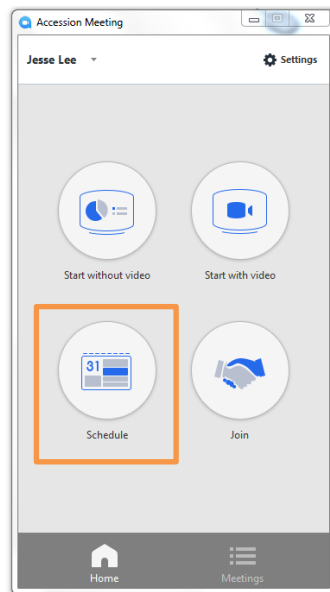
It is possible to schedule a meeting in which the host will be dialing into the meeting. This can be done using any of the scheduling options above, however the meeting must be set to “Enable join before host”.

## 3.3 On Demand and Scheduled Meetings Using the Stand-Alone Client

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

### 3.3.1 Scheduling a Meeting from the Stand-Alone Client

From the Stand-Alone client click on the “Schedule” button as shown below.



The schedule meeting dialog window will appear as shown on the below.

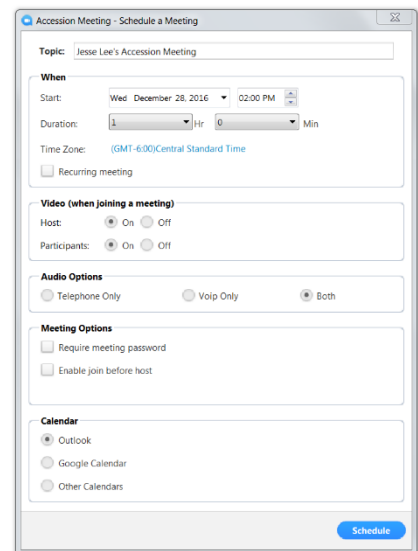
In the schedule meeting dialog, select the time and date for your meeting in the When section.

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

Audio Options allow you to select how participants can connect for the studio portion of the meeting.

Meeting Options allow you to:

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



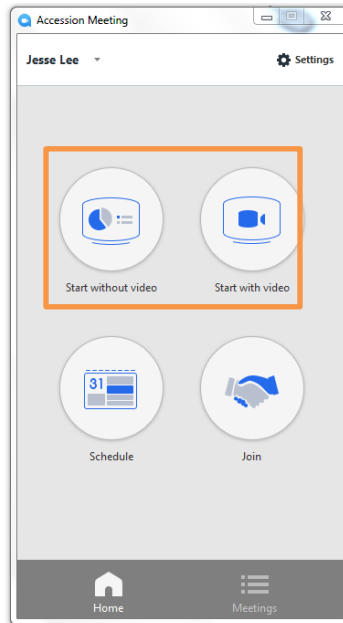


- Enable participants to join the meeting before you join the meeting

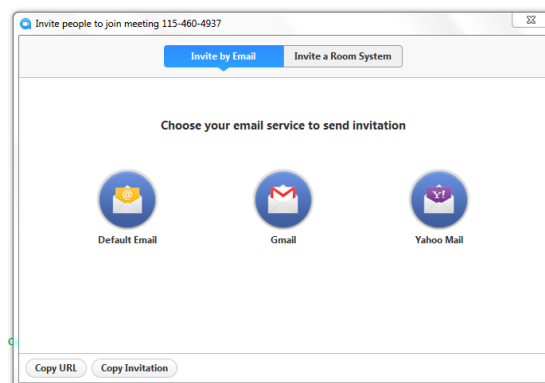
The Calendar section allows you to select the format for the invitation, including Outlook, Google and Other/Generic calendars.

### 3.3.2 Creating and On-Demand Meeting from the Stand-Alone Client

To create a meeting on demand from the Stand-Alone client click on either the “Start without video” or the “Start with video” button



Once the meeting starts, you will need will invite people to your meeting by clicking on the Invite icon on the bottom menu bar. You can invite people to your meeting via email as shown below.



This will open a new email in your default email program with all of the information needed for people to join your meeting. You will need to fill in the email addresses of the contacts to receive the invite in the “To”: field of the email.

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## 3.4 On Demand and Scheduled Meetings Using the Outlook Client in Stand-Alone Deployments

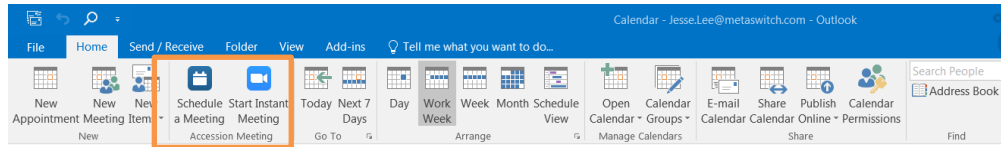
### 3.4.1 Downloading and Installing the Outlook Plugin

You can easily download the MaX calendar plugin for the Stand-Alone client from the Apps page in CommPortal. Log into CommPortal and click on the Apps tab and select MaX Meeting Outlook Plugin.

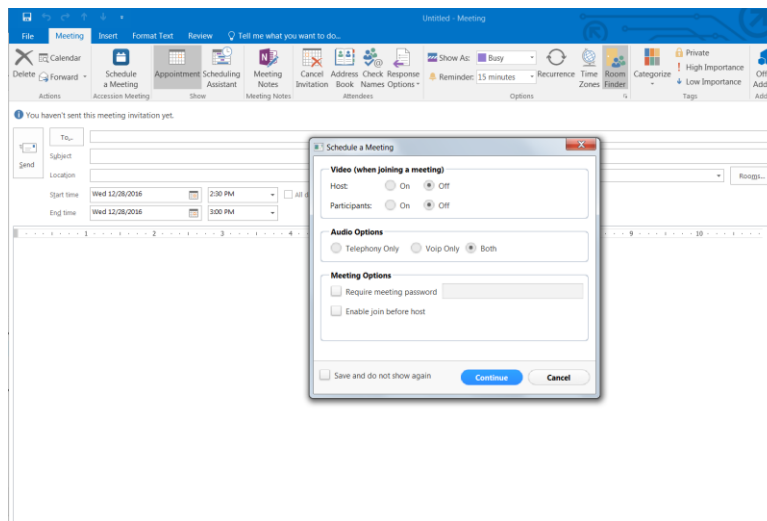
- Once you click the “Download Outlook Plugin” button your default browser will open to download the file.
- You will be prompted to save the file, choose yes
- Open your downloaded files in your browser. You should see a file named AccessionMeetingOutlookPluginSetup.msi. or AccessionMeetingOutlookPluginSetup.msi. Click or double click (as appropriate) to open the file.
- You will be prompted “Do you want to run this file”. Select Run and the install wizard will launch.
- Select next at the Welcome Screen
- At the Select Install Folder, accept the default install location by selecting Next
- Confirm installation by clicking Next and the install will begin. If you receive a message asking if you want to allow the program to install, select Yes.
- Once the installation is completed, click the Close Button

## 3.4.2 Schedule a Meeting Using Outlook Calendar

Now when you open Outlook Calendar you will see new icons on the toolbar for MaX Meeting as shown below.



You can now schedule an MaX Meeting by clicking on the “Schedule a Meeting” button and the following scheduling dialog window appears:



The “Video (when joining a meeting)” section allows you to set the default video settings for yourself and the participants. When on is selected, video will automatically be started when you join the meeting.

Audio Options allow you to select how participants can connect for the studio portion of the meeting.

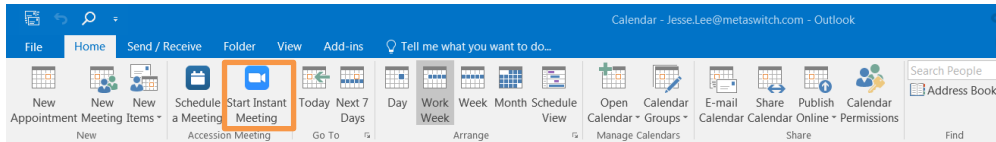
Meeting Options allow you to:

- Set and require a password to be entered before a participant can enter a meeting
- Enable participants to join the meeting before you join the meeting

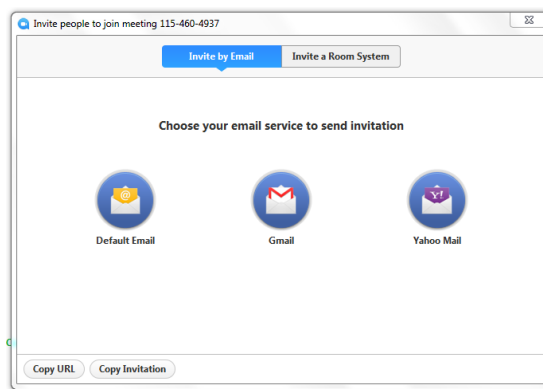
If these are the default setting you would like with all future meeting, then you can select the “Save and do not show again” button. Now the next time you schedule a meeting these setting will be uses and you will not see this screen. If you want to change these at any time, when you create a meeting select the “Change Settings” button from the MaX Meeting calendar toolbar as shown below:

### 3.4.3 Starting an On-Demand Meeting in Outlook Calendar

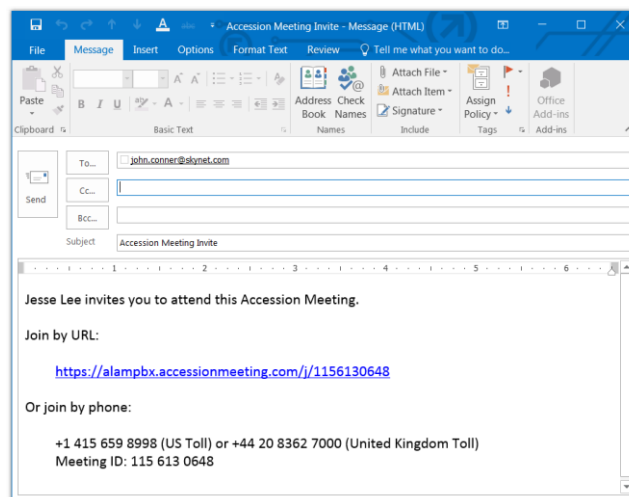
To start an on-demand meeting from your Outlook calendar, press the “Start Instant Meeting” button on the Outlook toolbar as shown below and your meeting will be started.



Once the meeting starts, you will need will invite people to your meeting by clicking on the Invite icon on the bottom menu bar. You can invite people to your meeting via email as shown below.



This will open a new email in your default email program with all of the information needed for people to join your meeting. You will need to fill in the email addresses of the contacts to receive the invite in the “To”: field of the email as shown below.



---

## 4 Connecting Audio and Video

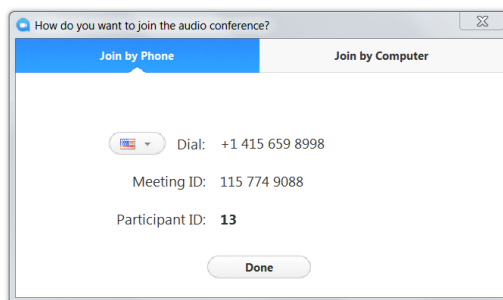
MaX Meeting uses the OPUS HD voice codec for connecting calls via your computer as well as dial-in connections from any telephone. Because it supports HD voice, you may notice that your audio connections sound best when connecting via your computer.

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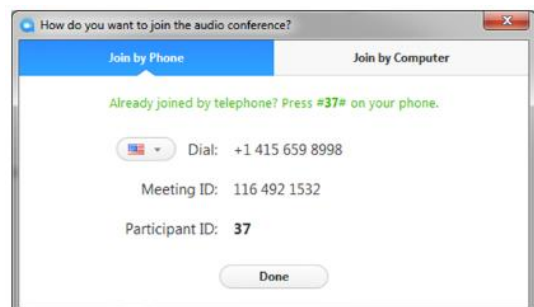
### 4.1 Dial-in Connections from the MaX Meeting Client

Users connecting to dial-in audio from the client will perform the following steps:

1. Click on the “Join Audio” button on the lower right of the window
2. Select the “Join by Phone” tab as shown below



3. Select the country that you are calling from using the dropdown next to the “Dial” field
4. Dial the number as listed in the “Dial” field.
5. You will be prompted to enter the Meeting ID and Participant ID via audio prompts.
6. If you are connected via your computer, you will need to enter your “Participant ID”. This will associate your audio with your video session. Note: If you forget to enter your “Participant ID” when joining the meeting you can also enter your “Participant ID” any time after enter the meeting by dialing #<participant\_ID># (without the <>) from your DTMF phone. Instructions for this are shown on the audio options window highlighted right.



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## 4.2 Dial-in Connections from the PSTN

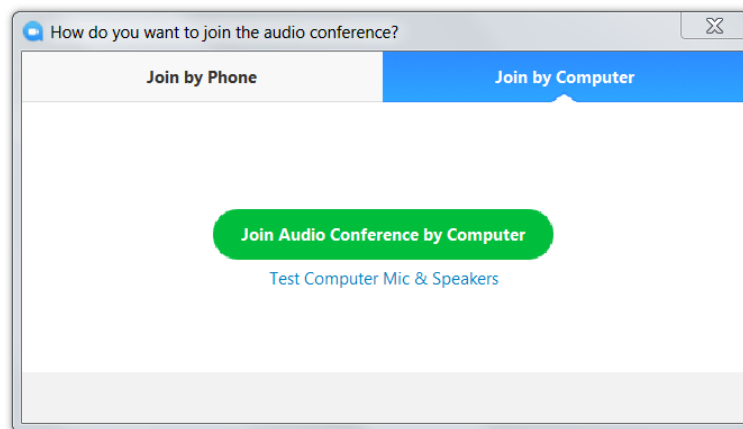
To dial into a meeting from the PSTN, you will use the dial-in number listed on the meeting invite. If you do not have a dial in number, you must contact the meeting host to obtain the number.

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

---

## 4.3 Connecting Audio from Your Computer

You can easily connect your computer audio to a meeting, however this works best if you have an audio headset connected to your PC. After joining or starting a meeting, click “Join Audio by Computer” to connect your computer’s speaker and microphone to the Meeting.

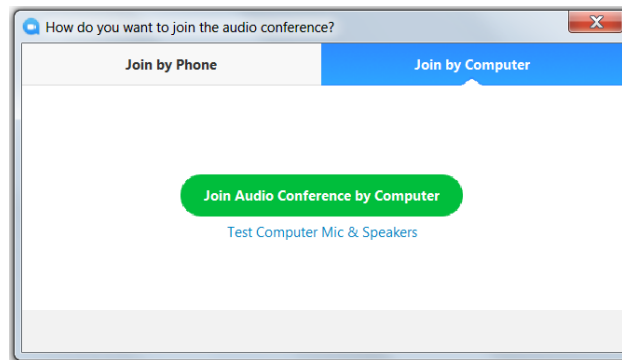


If using your computer’s speaker and microphone is your preferred audio method, you can set MaX Meeting to always automatically connect your audio via your computer. To set this in MaX Desktop go to Tools -> Options -> Meetings and select the “Connect Audio when starting or joining”.

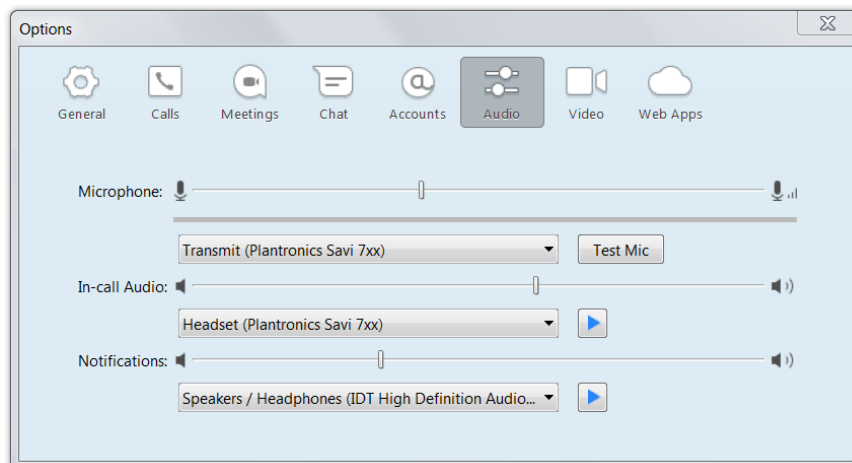
Once in the meeting, you can mute/unmute by clicking on the mute button on the bottom left side of the menu bar. You can also mute/unmute pressing “Alt + a” on your keyboard.

## 4.4 Configuring and Testing Computer Audio from MaX Meeting Desktop

You can configure and test your audio from both your MaX UC Desktop Options and directly from the MaX Meeting application. Once in the settings, they operate the same regardless of which method you used to access them. To access your computer audio from MaX Meeting, select the “Test Computer Mic and Speakers” option in the join by computer screen as shown below.



To test your computer audio from MaX UC Desktop, go to Tools -> Options -> Audio. Either method will result in the audio options dialog window appearing as below:



### 4.4.1 Microphone Settings

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

1. You can select your headset audio microphone using the dropdown list in the “Microphone Settings”. Select the headset or device that you will use to transmit your voice.
2. You can select the microphone volume using the sliding volume bar.

3. The “Test Mic,” button will allow you to record a sample so that you can hear the quality of your headset microphone.

## 4.4.2 In-Call Audio Settings

These settings allow you to control the receive speaker portion of the audio portion of your audio device.

1. You can select your headset/speaker audio device using the dropdown list in the In-Call Audio settings. Select the headset or device that you will use to receive audio from your computer.
2. You can select the headset/speaker volume using the sliding volume bar.
3. You can verify your headset/speaker volume by pressing the play icon, which will play sound over your selected device.

## 4.4.3 Notification Settings

The notification setting sets the device you will hear ringing and other MaX UC/ Meeting notification sounds. This should generally be your PC sound device, but can also be your headset.

1. You can select the notification headset/speaker volume using the sliding volume bar.
2. You can verify your notification headset/speaker volume by pressing the play icon, which will play sound over your selected device.

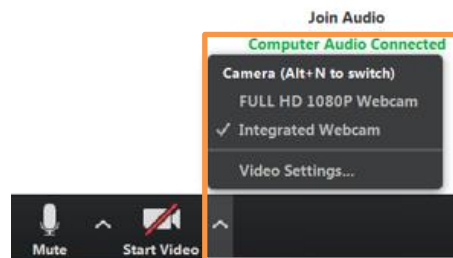


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## 4.5 Managing Your Video Settings

You can configure your video settings from both your MaX Desktop Options and directly from the MaX Meeting application. Once in the settings, they operate the same regardless of which method you used to access them. MaX Meeting can support video up to 720p with a refresh rate of 30 frames per second.

To access your video setting from the MaX Meeting client, click on the “Video Setting” icon as highlighted below





To access your video setting from MaX Desktop, go to Tool -> Options -> Video.

Using either method, the video settings screen will appear as shown below. Select the preferred video device as shown below and a sample of your video will be displayed.



---

## 4.6 Sharing your Video in a Meeting

To share your video while in an MaX Meeting you will simply press the “Start Video” button  located at the lower left of your screen. To stop sharing your video simply press the “Stop Video”  button located in the same place as the “Start Video” button as shown below.

---

## 4.7 Viewing Participants Video in a Meeting

When in an MaX Meeting, the host and all participants can share their video simultaneously. There are two ways to view everyone's video Active Speaker and Gallery mode. In gallery mode, you will see all up to nine video feeds on your screen and the active speaker will be highlighted as shown below. When more than nine people are in the meeting, you will have a scroll arrow to scroll through the video feeds.

50 Attendee Interface



NOTE: If you have the 100+ attendee class of service, you will be able to see up to 25 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



### 4.7.1 Far end camera control

Far End Camera Control allows for another user to take control of your camera and use Pan-Tilt-Zoom (PTZ) functionality of the camera. The webcam must have these features for this to work. The host of the meeting is the only user that can request far end camera control. Far end camera control must be enabled in your Advance Meeting settings.

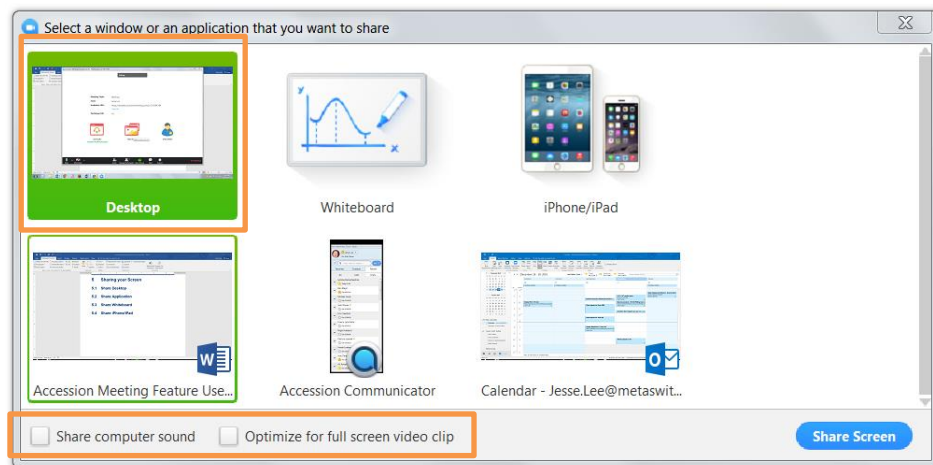
# 5 Sharing your Screen

## 5.1 Share Desktop

Using this option will share your entire desktop with other in the meeting. It is important to remember that others see exactly what you are seeing or typing on your screen when using the “Share Desktop” option.

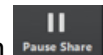
To share your desktop, use the following steps.

1. To share your desktop when in a meeting press the “Share” icon



2. Select the Desktop as highlighted above.
3. If you plan to share sound from your PC or will be showing video, you will need to select the checkbox for “Share Computer Sound” and “Optimize for full screen video clip” as shown above.
4. Press the “Share Screen” button and your screen is now viewable by everyone in the meeting.

5. To pause the screen, press the “Pause Share” button



or press the “Stop Share” button



6. To stop sharing your desktop press the “Stop Share” button



## 5.2 Share an Application

Using this option will share only be sharing the application that you select. Participants of the meeting will be able to see only the application selected. If you change to another application, the meeting participants will be unable to see the other application.

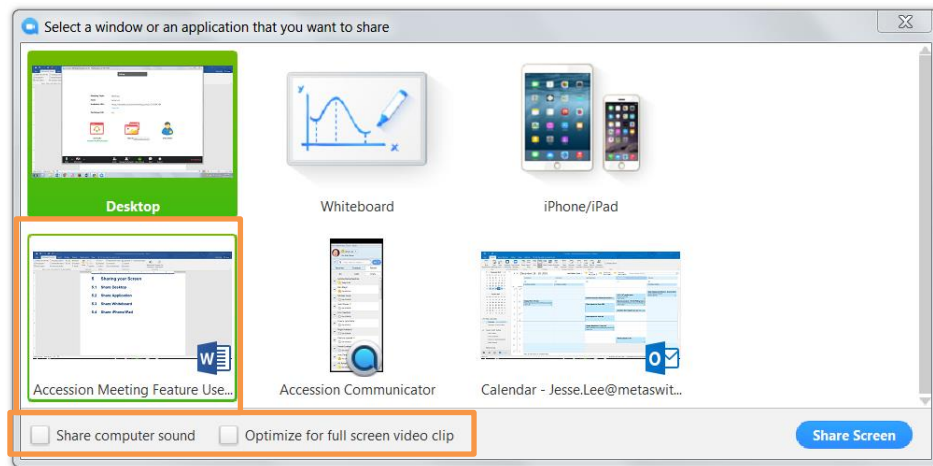
NOTE: There may be certain conditions where a small area around the application being shared is also viewable. This is a windows limitation and is not directly related to the MaX Meeting application.





To share your application, use the following steps.

1. To share a specific application when in a meeting press the “Share” icon



located on the bottom menu bar.



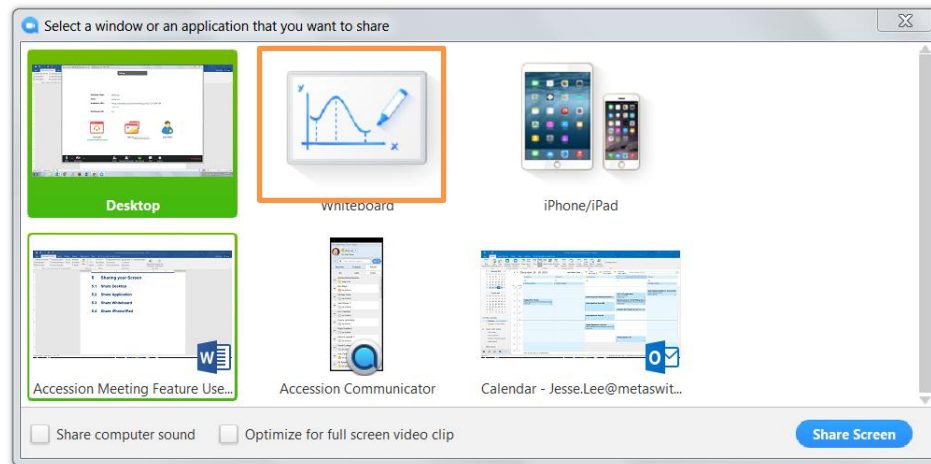
2. Select the application that you wish to share as highlighted above.
3. If you plan to share sound from your PC or will be showing video, you will need to select the checkbox for “Share Computer Sound” and “Optimize for full screen video clip” as shown above.
4. Press the “Share Screen” button and your application is now viewable by everyone in the meeting.
5. To pause the screen, press the “Pause Share” button  at the top of the screen. When this button is active, the participants will see snapshot of the screen that was being shared when the “Pause Share” button was pressed. They will continue to see this view until you press the “Resume Share” button  or press the “Stop Share” button .
6. To stop sharing your application press the “Stop Share” button .

## 5.3 Share Whiteboard

This option allows you to open a blank whiteboard that can be annotated by the host and participants using the annotation tools for more information on whiteboard annotation tool see section 7.

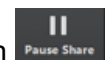
To share your whiteboard, use the following steps.

1. To share a whiteboard when in a meeting press the “Share” icon



2. Select the Whiteboard as highlighted above.
3. Press the “Share Screen” button and your whiteboard is now viewable by everyone in the meeting.

4. To pause the screen, press the “Pause Share” button



or press the “Stop Share” button



5. To stop sharing your whiteboard press the “Stop Share” button




## 5.5 Share iPhone/iPad

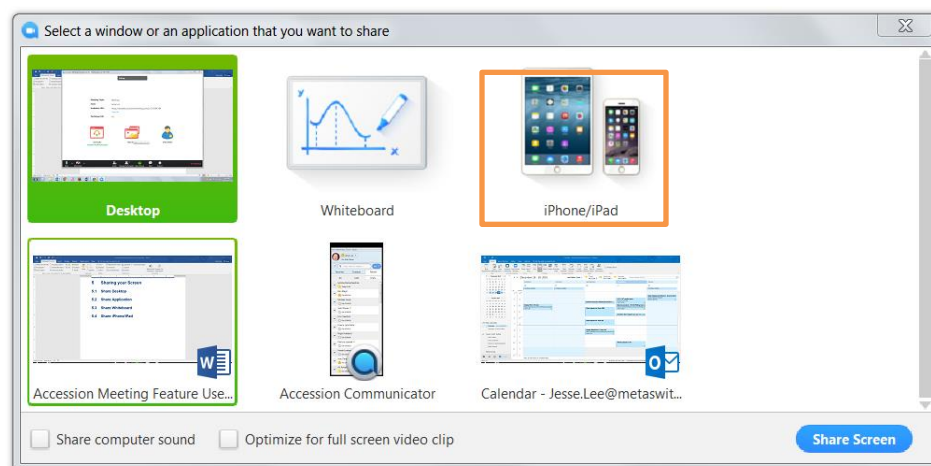
This option allows you to share your iPhone or iPad screen with the meeting participants.

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

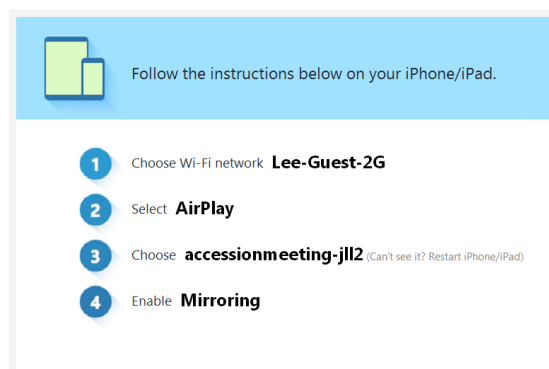
To download the iPhone/iPad sharing Plugin, you can simply click on the option to share iPhone/iPad in the MaX Meeting client (shown below

To share your iPhone or iPad, use the following steps.





1. To share your iOS device when in a meeting press the “Share” icon  located on the bottom of the menu bar.



2. Press the “Share Screen” button and you will see instructions for connecting to Airplay as shown below. Note: If you are prompted to allow Airhost.exe to install, select Yes.



3. Follow the instructions provided to connect your iOS device

1. Swipe up from the bottom on your device to bring up the menu
2. Click on the AirPlay button and select the MaX Meeting option
3. Turn on mirroring
4. You are now sharing your iPhone/iPad screen. You and your meeting participants will see the iPhone/iPad screen in the MaX Meeting client.
5. To pause the iPhone/iPad screen, press the “Pause Share” button  at the top of the screen. When this button is active, the participants will see snapshot of the screen that was being shared when the “Pause Share” button was pressed. They will continue to see this view until you press the “Resume Share” button  or press the “Stop Share” button .
6. To stop sharing your iPhone/iPad screen press the “Stop Share” button .

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## 5.6 Request or Give Desktop Remote Control

### 5.6.1 Request Desktop Control

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

1. Once the user has started sharing you will need to locate the tool bar menu drop down at the top middle of your "in meeting window". (i.e. "You are viewing Michael Mariscal's screen")

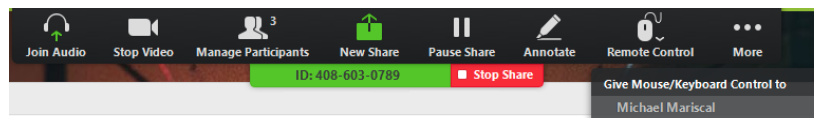


2. Next will select "Request remote control right" This will then send the host/participant sharing a notification asking whether or not they wish to allow you to control their screen.

### 5.6.2 Give Desktop Control

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

1. First, the host or participant must select "Share Screen", (The host cannot initiate screen share to present for another participant in the meeting.)
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 you would like to give control to. The participant can click anywhere on their screen to start control.





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## 6 Using MaX Meeting Chat

You have a chat function in MaX Meeting that is completely separate from your MaX UC Mobile and Desktop chat service. This MaX Meeting chat service ensures that all of your meeting participants are able to send and receive chat messages, even those outside of your business group.

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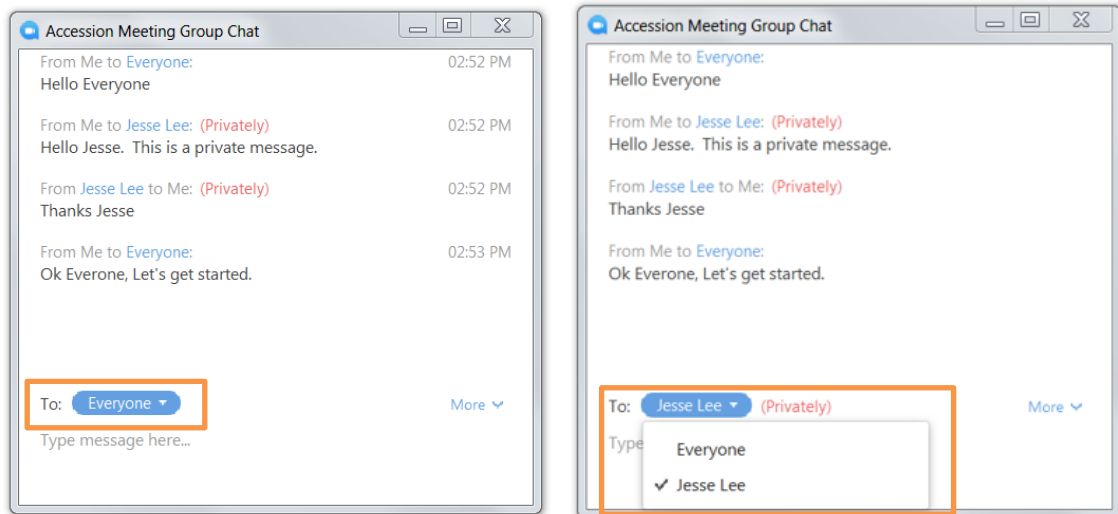
### 6.1 Using Public and Private Chat

There are two types of chat messages in MaX Meeting, public messages that are viewable by everyone in the meeting and private messages that are seen only by the person that you sent the chat message.

To use chat while in MaX Meeting, click on the “Chat” button



on the bottom menu bar, and the chat window will open as shown below.



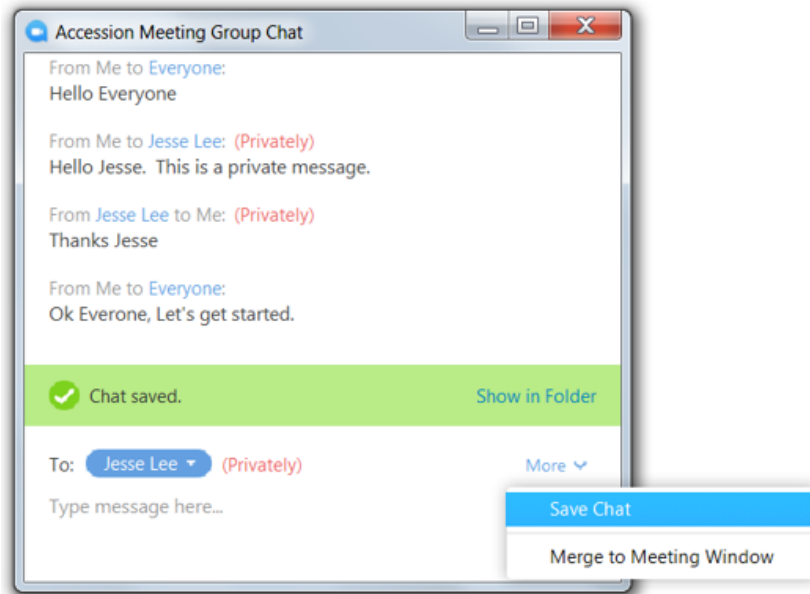
To send a chat message to all participants in the meeting, select everyone as highlighted above.

To send a private message to one individual participant, select the participants name from the dropdown list as shown above.

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## 6.2 Saving Chat Logs

You can save your chat log by selecting the “More” buttons at the bottom of the chat screen and selecting Save Chat as shown below.



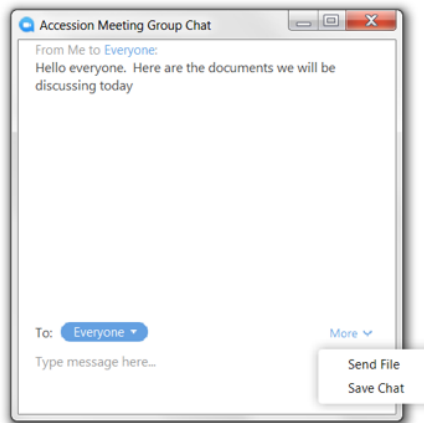
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## 6.3 In Meeting File Transfer

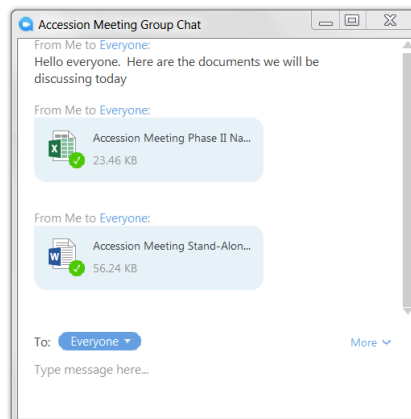
In-Meeting file transfer allows you to send files to other meeting participants once in an MaX Meeting using the MaX Meeting Chat function.

In Meeting File Transfer must be enabled in your Advanced Meeting settings.

To transfer a file while in a meeting, select the chat window, select more, then select “Send File” as shown below.




File that you send will be show to participants in the chat window for participants to download as shown below.

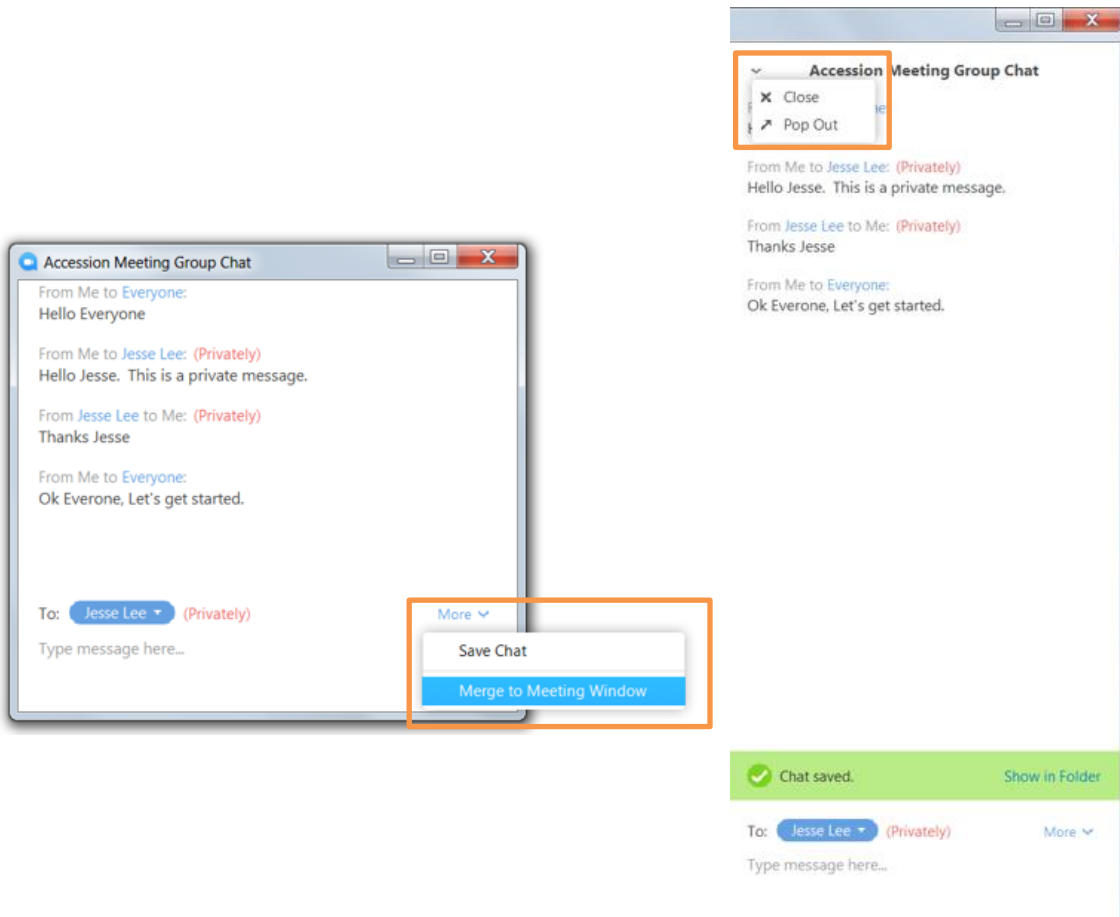


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## 6.4 Merge Chat to Meeting Window

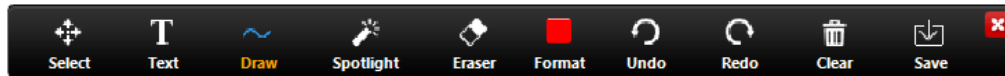
You can use your chat window as a pop-out or merged to the edge of the MaX Meeting main window. To move from a Pop-Out to merged, click on the more button and select “Merge to Meeting Window” as highlighted below.

To move from a merged chat window to a pop-out, click on the setting icon  in the upper left corner of the chat window and select "Pop Out" as highlighted below.



# 7 Using Annotation Tools

When sharing content or in a whiteboard session there are a large number of Annotation Tools that are available for the host and participants to use for annotating documents or whiteboards. The toolbar is accessed by pressing the “Annotate” button in the top tool bar while sharing a document, or while sharing a whiteboard.

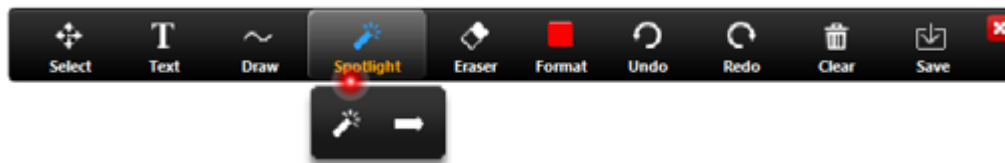


The tools on the toolbar above are as follows

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



- Drawing Tools – Provides a number of drawing tools that can be used to annotate shared screens or whiteboards. as shown above:



- Spotlight allows you to use an arrow or a red dot to point to a particular spot in the document or whiteboard that is viewable by all participants



- Format - Allows you to select the color used for your drawing tools by first selecting your drawing tool and then selecting “Format” and selecting 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

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## 8 Recording Your Meeting

The host can always record their own meetings and have a configurable option to let meeting participants to also record the meeting. When record is selected 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 to the host of participants local or network storage device.

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

A meeting can be replayed from your 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 in C:\Users\\accession communicator\recorded meetings\.

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

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## 9 Managing Meeting Participants


The Host of the meeting will have control over all functions and features in the meeting. To access these controls, select "Manage Participants" or right click on an individual participant.

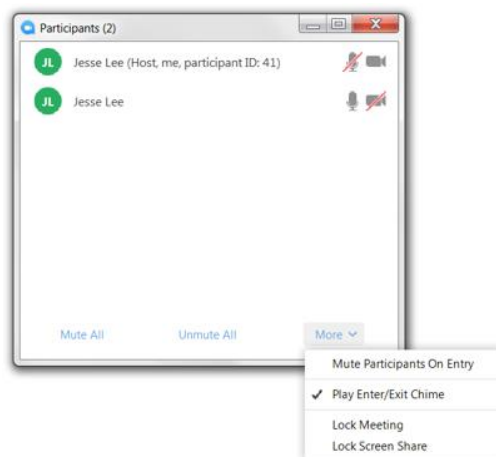
The main participant panel will contain a list of all of the participants in the meeting and will allow several functions.

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### 9.1 Host Participant Controls

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

To access these controls, select "Manage Participants" button  located on the menu bar. When selected the

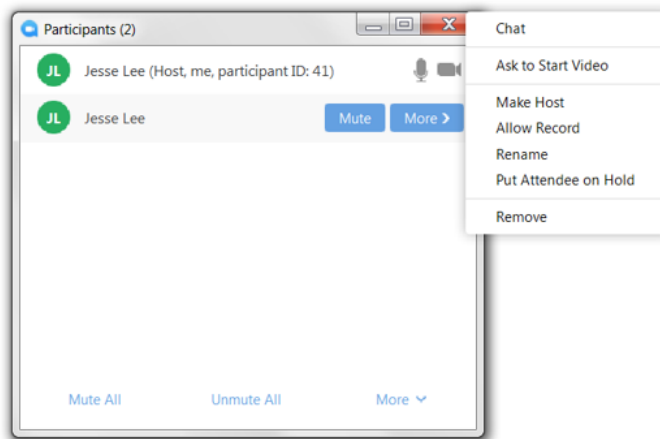


The main participants panel (shown above) contains several functionalities related to the meeting including:

- Mute/Unmute All: mute/unmute all participants in meeting - you will be given the option (checkbox) to allow or not allow participants to unmute
- Lock Screen sharing: by selecting lock screen sharing, other participants will not be able to share screen.
- Mute on Entry: participants will automatically mute as they enter the meeting
- Play Enter/Exit Chime: plays a sound as participants join and leave the meeting
- Lock meeting: you can lock your meeting so that no other participants may join



Other options are also available by hovering over a specific participant. As shown below. Note: Although all functions are shown below, the functions shown on your screen may vary based on what functions are enabled in your settings and advanced settings.



- Stop/Ask to Start Video - You can stop a participant's video stream or send them a request to start their video.
- Make Host - You can grant another participant permission to be the host of the meeting - the host of the meeting can also Reclaim Host after making another participant the host of the meeting.
- Make Co-Host - Once a user has been made a Co Host, they will be able to do the following:
  1. Mute/Unmute All: mute/unmute all participants in meeting - you will be given the option (checkbox) to allow or not allow participants to unmute
  2. Lock Screen sharing: by selecting lock screen sharing, other participants will not be able to share screen.
  3. Mute on Entry: participants will automatically mute as they enter the meeting
  4. Play Enter/Exit Chime: plays a sound as participants join and leave the meeting
  5. Lock meeting: you can lock your meeting so that no other participants may join
  6. Stop Video: stop participant's video stream (unable to start video)
  7. Remove: you can kick/boot participant(s) from the meeting
  8. Rename: rename the attendee name selection
  9. Start attendee on hold: Place the participant "on-hold", removing them from the video and audio conference - \*you must have Enable attendee on-hold selected in your Profile Settings prior to starting the meeting
  10. Note: The Co Host will not be able to end the meeting or make another user host.

- Allow Record - You can allow other participants the option of recording the meeting (To learn more about recording please click [here](#)).
- Rename - Rename the attendee name selection.
- Put Attendee on Hold - When placed on hold the participants video is stopped and they are placed in the mute. Other participants will see that user's avatar if present and that they are muted. The person on hold will see "You are on hold" on their screen and will have no control in their client until that are taken off hold.
- Remove - You can kick/boot participant(s) from the meeting.

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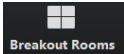
## 9.2 Managing Video Breakout Rooms

Video Breakout Rooms allow you to split your MaX Meeting in up to 50 separate sessions allowing a team to be split to work on different topics and later return to the main meeting.

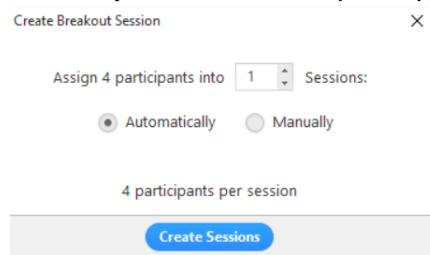
The meeting host can choose to split the participants of the meeting into these separate sessions automatically or manually and can switch between sessions at any time. Up to 50 breakout sessions can be created with a maximum of 200 participants in a session (requires Large Meeting 200 add-on). Breakout session participants have full audio, video and screen share capabilities.

Breakout rooms must be enabled in advanced settings.

### 9.2.1 Creating Video Breakout Rooms

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

1. Select the number of sessions you would like to create, and how you would like to assign your participants to those sessions.
  - Automatically: Let MaX Meeting split your participants up evenly into each of the sessions
  - Manually: Choose which participants you would like in each session



Create Breakout Session

Assign 4 participants into 1 Sessions:

Automatically  Manually

4 participants per session

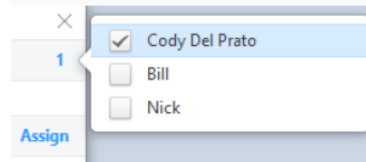
Create Sessions

2. Click Create Sessions. - Your sessions will be created, but will not start automatically. Once the sessions are created, you can manage the sessions prior to starting them.

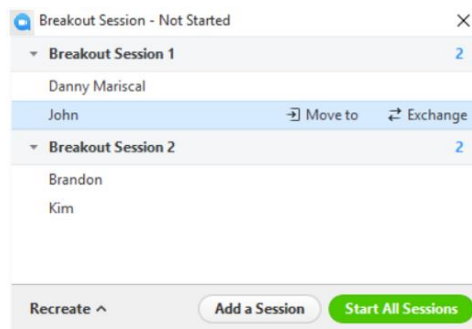
## 9.2.2 Assigning Participants to a Session

To assign participants to your Breakout Sessions, select “Assign” next to the session you wish to assign participants to and select the checkbox next to each participant you wish to assign to that session. Repeat this for each breakout session.

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

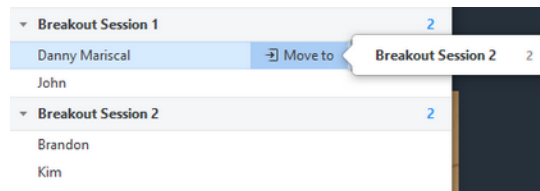


## 9.2.3 Preparing Breakout Sessions

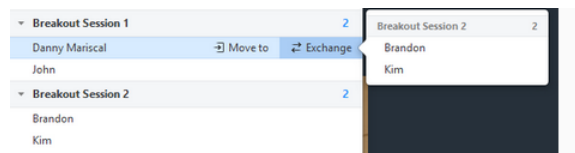


If you selected to assign participants to sessions Automatically, your sessions will appear with the participants assigned evenly across your sessions. If you chose to assign participants Manually or wish to make changes, you can do so before starting the sessions. Participants who are not assigned to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

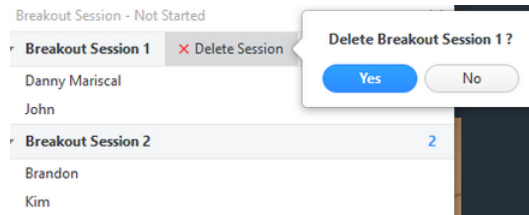
- Move to (participant) - Select the session in which you wish to move the participant



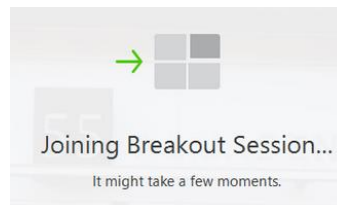
- Exchange (participant) - Select a participant in another session to swap the selected participant with



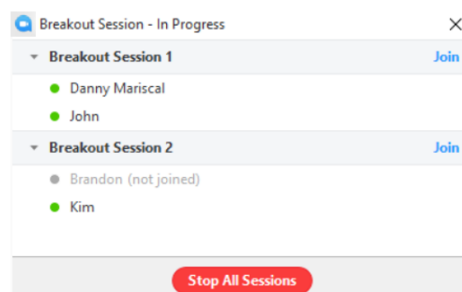
- Delete Session - delete the selected session



- Recreate - Allows you to start the Breakout Session creation from scratch
- Add a Session - Add another Breakout Session
- Start All Sessions - Starts the sessions.
  - All participants will be moved to their respective sessions after confirming the prompt to join the Breakout Session. The host will be left in the main meeting until manually joining one of the sessions. The participants (and the host when manually joining a session) will see the message shown below when being moved to the Breakout Session.



## 9.2.4 Managing Breakout Session – In Progress




Once the Breakout Sessions have been started, the participants will be asked to join the Breakout Session. The host will stay in the main meeting until joining a session manually. If a participant has not joined the session yet, it will be noted by "(not joined)" next to their name.

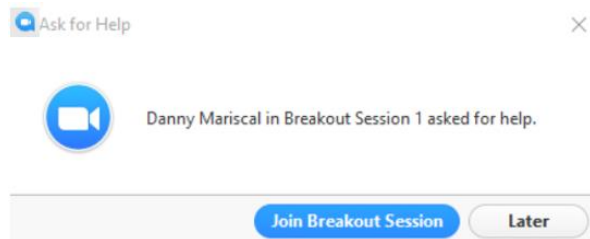
- Join (session) - Allows the host to join the breakout session selected
- Leave (session) - Allows the host to leave the session and return to the main meeting (only shows when in a Breakout Session)

- Stop All Sessions - Will stop all sessions after a 30 second countdown, shown to the host and participants, and return all participants back to the main meeting.

## 9.2.5 Ask for Help

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

The meeting Host will be prompted to join the session from the which the request originated from. Select “Join Breakout Session” to join the session.



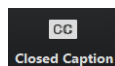

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## 9.3 Closed Captions

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

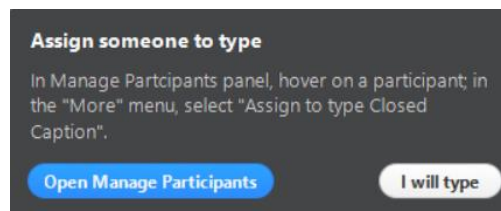
Closed captions must be enabled in the advanced user settings.

- To used closed captions while in a meeting, press the “Closed Caption



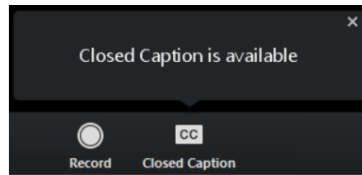
button in the menu bar.

- This will prompt you to either type the captioning yourself or to assign another participant in the meeting to do so as shown below. You can also right click on a participant in the Participants Panel and assigning “Assign to type Closed Caption”



- You can then right click on a participant in the Participants Panel and assigning “Assign to type Closed Caption”

- Participants will then receive a notification that “Closed Caption is available” in their menu bar as shown below.



- After receiving the notification, a participant clicking on the “Closed Caption” button will see the closed captions as they are entered into the Closed Captions panel.

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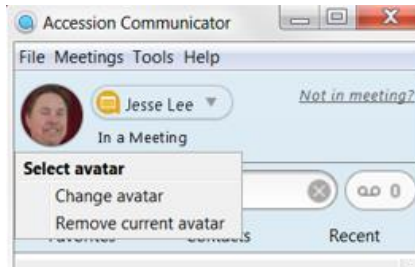
# 10 MaX Meeting Settings

MaX Meeting provides the ability for you to customize your meeting experience to best suit your preferences. This customization is performed in the meeting “Settings” which are accessed from MaX UC Desktop from Tools -> Options -> Meetings. This section describes each of the customization settings.

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## 10.1 Setting your Meeting Avatar

Note that the avatar that is shown to others in MaX Meeting when you have video turned off is set in MaX UC Desktop. To select or change your avatar click on the MaX UC Desktop Avatar and select Add, Change or Remove avatar as shown below

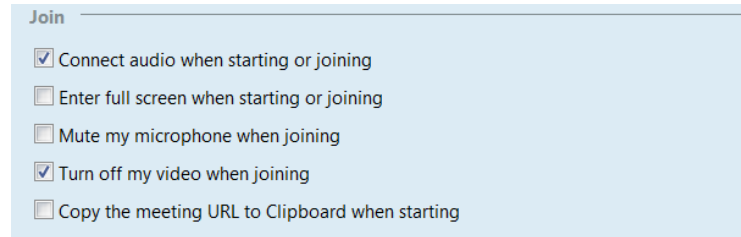




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## 10.2 Join Settings

The “Join” settings control how you will connect to meetings. The configurable options include:



Join

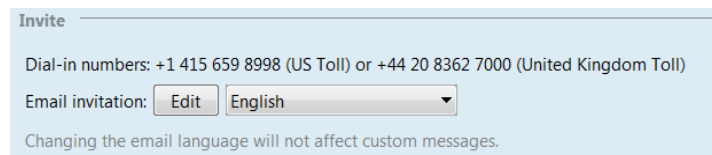
- Connect audio when starting or joining
- Enter full screen when starting or joining
- Mute my microphone when joining
- Turn off my video when joining
- Copy the meeting URL to Clipboard when starting

- Connect to audio when starting or joining – When checked, you will always be connected to audio via your computer whenever you start or join a meeting.
- Enter full screen when starting or joining – When checked, you will always enter meetings in full screen mode. You can exit full at any time by pressing the “Esc” key on your keyboard.
- Mute my microphone when joining - When checked, you will always enter a meeting on mute. To unmute, you will click on the mute button at menu bar located at bottom of your screen. You can also mute/unmute pressing “Alt + a” on your keyboard.
- Turn off my video when joining - When checked, you will always enter a meeting with your video disabled. To enable your video, simply press the “Start Video” button located at the bottom left of the menu bar.
- Copy the meeting URL to the Clipboard when starting - When checked, the meeting URL will always be copied to the clipboard. You can use this to past into email or IM to invite others to the current meeting.

---

## 10.3 Invite Settings

The “Invite” settings control how your MaX Meeting email invitations to will be formatted. The configurable options include:



Invite

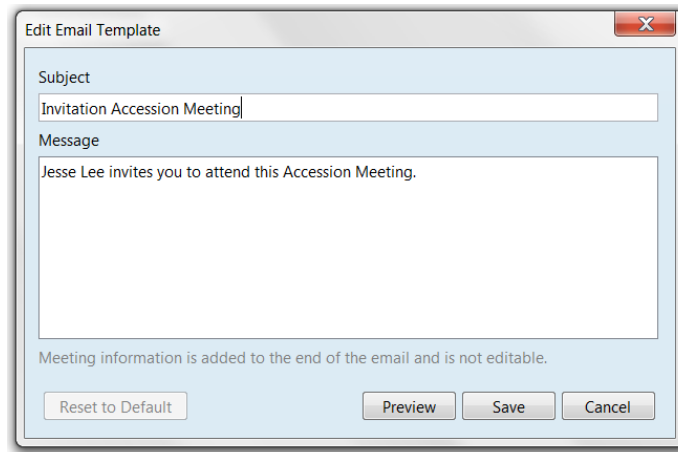
Dial-in numbers: +1 415 659 8998 (US Toll) or +44 20 8362 7000 (United Kingdom Toll)

Email invitation:

Changing the email language will not affect custom messages.

- Dial-in numbers list the numbers that are used to dial into your meetings. These are set by your service provider and cannot be modified.

- Email Invitation “Edit” – This option allows you to edit the email that is sent to meeting participants. By pressing “Edit” you can modify the email Subject as well as the body of the email message. NOTE: The actual meeting information is added to the end of the email message and is not editable.

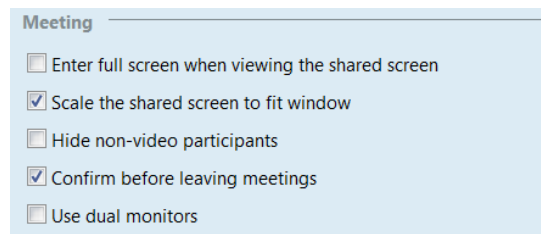


- Email Invitation Language – You can select the language to be used in the invite by clicking on the language dropdown list. NOTE: If you customize the email message, it will only be show in the language in which it was written.
  - Clicking “Preview” will show you an example of what your email invitations will look like to participants.
  - Clicking “Save” will save your changes, or clicking “Cancel” will cancel any changes made.
  - Click “Reset to Default” will remove any changes you have made and restore the default invitation email text.

---

## 10.4 Meeting Settings

The Meeting settings control how specific meeting items will operate. The configurable options include:



- Enter full screen when viewing the shared screen – When checked, you will always be placed into full screen mode when viewing another’s shared screen.

- Scale the shared screen to fit the window – When checked, the shared screen will always be sized to fit the current viewing area.
- Hide non-video participants - When checked, all dialing users will not be shown in the video gallery. You will still be able to hear their audio and see them in the “Participants” panel.
- Confirm before leaving meeting - When checked, the system will always confirm that you want to leave the meeting before allowing you to exit.
- Use Dual Monitors - When checked, the system will allow you to share a select a second monitor screen to be shared during the meeting.

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## 10.5 Download Outlook Plugin




This option allows you to download and install the Outlook plugin which allows you to schedule MaX Meeting directly from your Outlook calendar.

1. Once you click the “Download Outlook Plugin” button your default browser will open to download the file.
2. You will be prompted to save the file, choose yes
3. Open your downloaded files in your browser. You should see a file named AccessionMeetingOutlookPluginSetup.msi. or MaXMeetingOutlookPluginSetup.msi. Click or double click (as appropriate) to open the file.
4. You will be prompted “Do you want to run this file”. Select Run and the install wizard will launch.
5. Select next at the Welcome Screen
6. At the Select Install Folder, accept the default install location by selecting Next
7. Confirm installation by clicking Next and the install will begin. If you receive a message asking if you want to allow the program to install, select Yes.

Once the installation is completed, click the Close Button

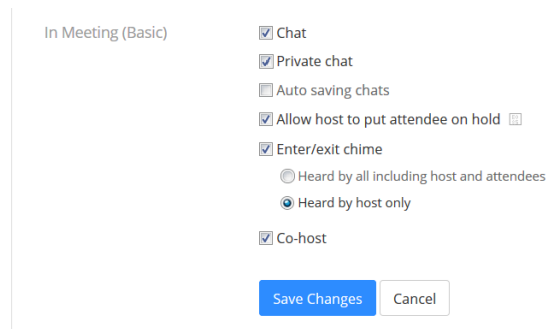
## 10.6 Advanced Settings

The “Advanced” settings provide a more granular customization of your MaX Meeting experience. As show below, the Advance settings page displays your current settings and provides an “Edit” link to the right of each section that will allow you to modify the settings. This section describes each of the Advanced customization settings.

My Settings		
In Meeting (Basic)	<ul style="list-style-type: none"><li><input checked="" type="checkbox"/> Chat</li><li><input checked="" type="checkbox"/> Private chat</li><li><input type="checkbox"/> Auto saving chats</li><li><input type="checkbox"/> Allow host to put attendee on hold </li><li><input type="checkbox"/> Enter/exit chime</li><li><input type="checkbox"/> Co-host</li></ul>	<a href="#">Edit</a>
In Meeting (Advanced)	<ul style="list-style-type: none"><li><input type="checkbox"/> Breakout room</li><li><input type="checkbox"/> File transfer</li><li><input type="checkbox"/> Closed caption</li><li><input type="checkbox"/> Far end camera control</li><li><input type="checkbox"/> Share dual camera</li></ul>	<a href="#">Edit</a>
Recording	<ul style="list-style-type: none"><li><input checked="" type="checkbox"/> Local recording</li><li><input type="checkbox"/> Automatic recording</li></ul>	<a href="#">Edit</a>
Security	<ul style="list-style-type: none"><li><input type="checkbox"/> End-to-end encryption </li><li><input type="checkbox"/> Generate and require password for participants joining by phone </li></ul>	<a href="#">Edit</a>

## 10.6.1 In Meeting (Basic)

This section allows you to modify features used when in a meeting as defined below.



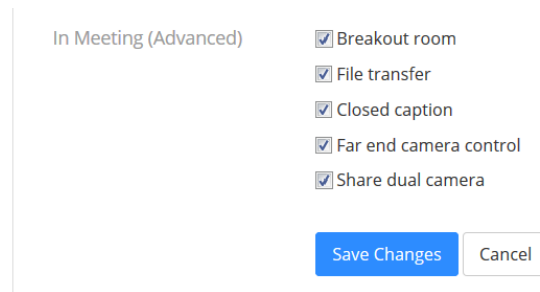
In Meeting (Basic)

- Chat
- Private chat
- Auto saving chats
- Allow host to put attendee on hold
- Enter/exit chime
  - Heard by all including host and attendees
  - Heard by host only
- Co-host

- Chat – Enables the MaX Meeting chat to everyone function. This function is enabled by default
- Private chat - Enables the MaX Meeting private chat to an individual participant. This function is enabled by default
- Auto saving chats – When checked, your chat logs from all meetings will automatically be saved to C:\Users\\accession communicator\recorded meetings\.
- Allow host to put another attendee on hold – If enabled in Advanced Settings, you will see the option. When checked, you will have the option to place a participant on hold. When placed on hold the participants video is stopped and they are placed in the mute. Other participants will see that user’s avatar if present and that they are muted. The person on hold will see “You are on hold” on their screen and will have no control in their client until that are taken off hold.
- Enter/exit chime – When checked, you will have the option to set a chime to be played anytime a participant enters or exits the meeting. You can also choose if only you hear the chime, or if everyone in the meeting will hear the chime.
- Co-Host –If enabled in Advanced Settings, you will see the option. When checked you will be able to make a participant a co-host. See section 9.1 for more information on Co-Host functions.
- Save Changes / Cancel – To save changes made, press the “Save” button, or press the “Cancel” button to cancel your changes.

## 10.6.2 In Meeting Advanced Settings

This section allows you to modify advanced features used when in a meeting as defined below.



In Meeting (Advanced)

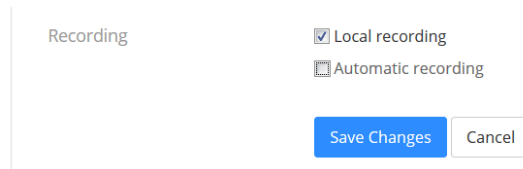
- Breakout room
- File transfer
- Closed caption
- Far end camera control
- Share dual camera

Save Changes Cancel

- Breakout room – When checked, Breakout rooms will be enabled. For more information See section 9.2.
- File transfer – When checked, this option allows the host to transfer files to meeting participants. For more information, see section 6.3.
- Closed caption – When checked, this option allows the host or an assigned meeting participant to type close captions. For more information see section 9.3
- Far end camera control - When checked, this option allows for another user to take control of your camera and use Pan-Tilt-Zoom (PTZ) functionality of the camera. The webcam must have these features for this to work. The host of the meeting is the only user that can request far end camera control.
- Share dual cameras - Screen sharing a camera input allows for sharing a camera connected to your computer. This will allow using two cameras at once during a meeting. One camera may be pointed at a whiteboard while the other is pointed that the meeting participants.

## 10.6.3 Recording Settings

This section allows you to choose of recording is allowed as well as the option to automatically record all meetings as shown below.



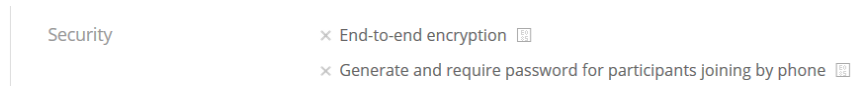
Recording

- Local recording
- Automatic recording

Save Changes Cancel

## 10.6.4 Security Settings

The security setting allow you additional meeting security by allowing you to choose to Encrypt your meeting and/or require a password for meetings as shown below:



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# A Supported SIP/H.323 Conference Room Systems

## A.1 Polycom Room Systems Supported:

- VSX 7000\*, 7000e\*, 8000
- Group Series
- HDX 6000 series
- HDX 7000 series
- HDX 8000 series
- HDX 9000 series
- RMX 2000 MCU (MPMx cards)

\*Software version 7.5 or higher

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## A.2 Lifesize Room Systems Supported:

Icon 600, 800

Express 220

Team 220

Room 220, 220i

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## A.3 Cisco/Tandberg Room Systems Supported:

Cisco SX10 and SX20

Cisco C20, C20 Plus, C40, C60, C90

Tandberg 880 MXP

Tandberg 6000 MXP



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## **A.4 TelyHD Room Systems Supported:**

Tely 200

TelyHD Pro

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## **A.5 Aver Room Systems Supported:**

EVC 900, 130, 130P, 100

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## **A.6 Huawei Room Systems Supported:**

VP9030, VP9050 and TE30

