



2.1.1 Setting up a MaX Meeting using MaX Webinar

Users who are subscribed to MaX Meeting and have MaX Webinar can create a MaX Meeting in any of the following ways:

- On the MaX Webinar UI, the Meetings menu includes Create a Meeting and Schedule a Meeting options. These options are described in more detail below.
- You can use the Start Meeting menu option found on the Start button on your CommPortal account.

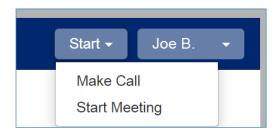


Figure 1. Start Meeting button in CommPortal

• If your CommPortal account is integrated with Microsoft Outlook, you can use the Schedule a Meeting and Start Instant Meeting buttons in the Outlook UI.

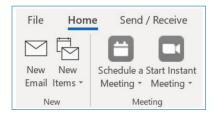


Figure 2: Outlook MaX Meeting buttons

Large MaX Meetings

Regular MaX Meetings can include up to 100 participants. However, as a Business Group user, you may be allocated licenses that enable you to set up larger meetings for up to 500 attendees. You can check what Large MaX Meeting licenses you have by clicking the Allocated Licenses link on the CommPortal Home page.



Figure 3: Allocated Licenses link on the CommPortal Home page



Clicking on this link launches a pop-up that displays the licenses currently allocated to you. The number alongside the license type indicates the attendee limit, so the user in the following screenshot is able to create Large MaX Meetings with up to 200 attendees, as well as MaX Meeting Webinars with up to 100 attendees.



Figure 4: Allocated Licenses pop-up

Setting up an instant MaX Meeting from the Desktop UI

To set up an instant MaX Meeting, select the **Create a Meeting** option on the **Meetings** menu in the MaX Webinar UI. This will launch the **Create a Meeting** screen where you can create your meeting invitations.

Use the **Invite IM Contacts** option on this screen to invite IM-enabled contacts by checking the boxes alongside each contact, then pressing **Start Meeting**.

- Any contacts who cannot be invited using IM are grayed out.
- MaX Meetings are limited to a maximum number of attendees. You may only invite contacts up to your

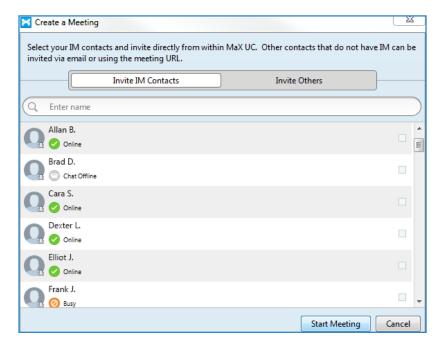


Figure 5: Inviting contacts to a MaX Meeting



permitted limit. A contact will not be able to join the meeting if the meeting already has the maximum permitted number of attendees.

Meeting invitations that are sent out over Instant Messaging do not appear on your chat window. Instead, invitees will see the invitation on their screen and can click on it to join the meeting. The invitation will time out if the invitee does not respond.

You can also use the Invite Others option on the Create a Meeting screen to invite other participants who do not have Instant Messaging to join a MaX Meeting. This option displays the following screen.

Use the following options on this screen to invite participants to join a MaX Meeting.

• Use the **Send Invite via Email** and **Copy Meeting Link** buttons to either send an auto-generated email with joining details or copy the meeting URL to their clipboard and then send it separately, for example by text message.

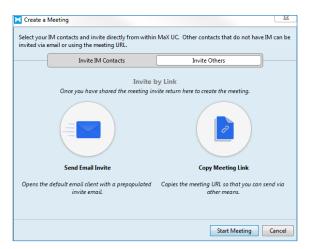


Figure 6: Inviting others to a MaX Meeting.

The recipient can then simply click the link in the email or copy the URL into a browser to join the MaX Meeting. If they do not have the MaX Meeting client installed, it will download automatically.

Once the MaX Meeting host has sent out all of the invitations, they should return to the **Create a Meeting** screen and click **Start Meeting**.



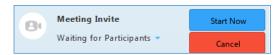


Figure 7: MaX Meeting Invite

You can also use the MaX Meeting icon to start a meeting while chatting or in a call with an IM-enabled contact, and the contact can simply click on the invitation to join a meeting.

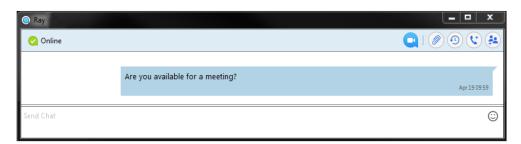


Figure 8: Invitation to an instant MaX Meeting

The MaX Meeting is then instantly created. Both participants can then invite others to join the MaX Meeting if they wish.

Scheduling a MaX Meeting

The MaX Meeting host can use the **Schedule a Meeting** option on the **Meetings** menu in the MaX Webinar UI to schedule a one-off or recurring MaX Meeting for a specified time in the future.

This option launches the **Schedule a Meeting** screen, where the host can set the time and length of the meeting, and specify a number of options for the meeting, for example audio and video settings, and the calendar to be used. The host can also choose to use a Personal Meeting ID (PMID) or Personal Link (PL) for this meeting rather than a randomly-generated meeting ID. Participants can then either type this PMID or PL in the **Join Meeting** dialog, or use the URL that contains either the host's PMID or Personal Link to join the MaX Meeting. When using a Personal Meeting ID or Personal Link, the host should either select to require a meeting password or to disable participants joining before the host to prevent any potential abuse of their meeting by third parties who may know their PMID or Personal Link.





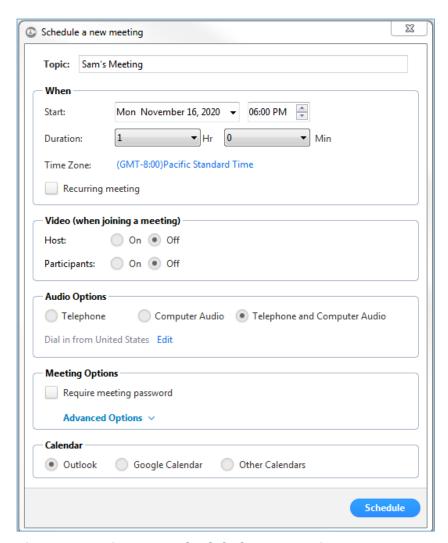


Figure 9: Setting up a scheduled MaX Meeting

Once the host has set all of the values they require, pressing **Schedule** opens a meeting invitation containing details of the meeting and how to join. The host can then select the participants they want to invite, and add any further information to the invitation before sending it to their chosen participants. The MaX Meeting will then be added to all of the participants' calendars.

Setting up Scheduling Assistants

Users can also set up scheduling assistants who can schedule a MaX Meeting on their behalf.

To do this using MaX Webinar, users can select an option on **Tools->Options->Meetings** in the MaX Webinar UI, where they can choose one of their contacts as a Scheduling Assistant.

Scheduling Assistants must have MaX Webinar and MaX Meeting and be in the same Business Group as the user who is setting them up. MaX will display an error message if a user attempts to nominate a contact as a Scheduling Assistant who does not fulfill these criteria.



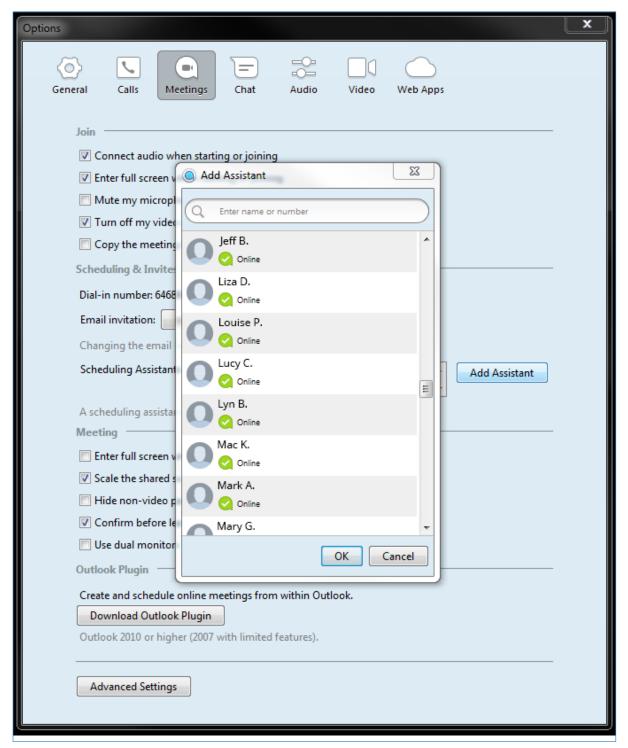


Figure 10: Selecting a Scheduling Assistant

If a user is granted scheduling privileges while their MaX client is running, they must restart the MaX client before they can schedule meetings for another user. When a user who has been selected as a Scheduling Assistant sets up a MaX Meeting, they will see a drop-down on the **Schedule a Meeting** screen listing all of the other users that they have scheduling privileges for, allowing them to schedule the meeting as if they were that user.



The MaX Meeting Uls on MaX Webinar

MaX Webinar users can also use options on the **Meetings** menu to view any upcoming MaX Meetings that they have scheduled and to access recordings of past MaX Meetings.

Any meetings set up by a scheduling assistant will appear on the **Upcoming Meeting** screen for both the scheduling assistant and the user for whom they have set up the meeting.

This screen also shows the user's currently configured Personal Meeting ID, along with buttons that the user can use to start or schedule a MaX Meeting that uses the PMID, or to edit it. Note that if the host changes the Personal Meeting ID, this will be changed on all upcoming meetings and participants who know the old PMID will not be able to use it to join a MaX Meeting.

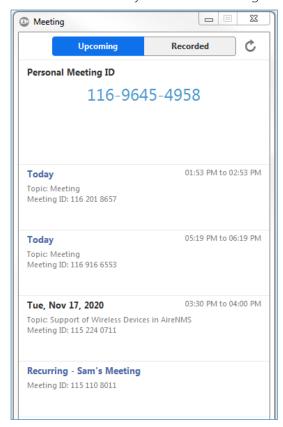


Figure 11: Viewing upcoming MaX Meetings

2.1.2 Setting up a MaX Meeting using MaX Mobile

MaX Mobile users can create MaX Meetings and invite participants using the MaX Mobile UI. This UI operates in a very similar way to the MaX Webinar UI that is described in **Setting up a MaX Meeting using MaX Webinar** on **page 6**.

Users can employ the **Meetings** option on MaX Mobile to launch the main meetings screen, from where they can create an instant MaX Meeting, schedule a MaX Meeting for a later time, join a meeting, or view details of all upcoming meetings.



Creating an instant MaX Meeting using MaX Mobile

The **Create** button launches a new screen where a user with Instant Messaging can invite any of their IM contacts to join the meeting directly from within MaX. Users can also click on an **Invite Others** tab to invite non-

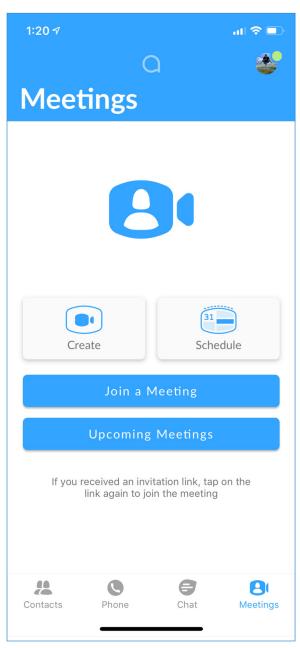


Figure 12: MaX Meeting on mobile devices



IM contacts to join a MaX Meeting, either via email or by copying the Meeting URL to a clipboard so that they can then share it. Users who do not have Instant Messaging must use this way of inviting contacts.

Users can also employ an **Invite to Meeting** option that appears in the UI alongside any IM enabled contact, for example in the contact list or in call history details, that then launches the Create a **Meeting** screen prepopulated with the contact's details.



Figure 13: Creating a MaX Meeting

MaX Meetings are limited to a maximum number of attendees. Users must only invite contacts up to their permitted limit. A contact will not be able to join the meeting if the meeting already has the maximum permitted number of attendees.

Scheduling a MaX Meeting using MaX Mobile

Choose the **Schedule** button to launch another page where you can schedule a MaX Meeting. On this screen, you can configure the following options for the meeting.

- Enter a topic for the meeting.
- Select whether this is a one-off or recurring meeting.



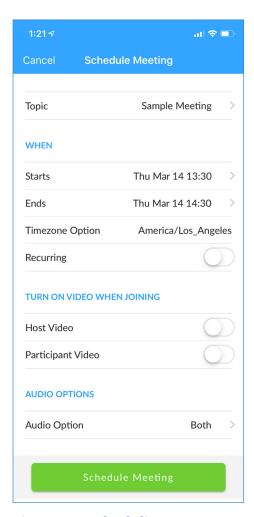


Figure 14: Scheduling a MaX Meeting on MaX Mobile

- If it's a one-off meeting, 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.
- Opt to use your Personal Meeting ID for this meeting.
- Once you have entered all the details, press the Schedule Meeting button at the bottom of the screen. You can then choose to add invitees by email or by creating a calendar event. This action takes you to your device's preferred email or calendar app.
- Selecting to invite participants by email launches a screen displaying the email meeting invitation that contains all the details for the meeting. Enter all the recipients who should receive the invitation in the To field, and then send the invitation.
- Once you have set up a meeting, your settings will be remembered the next time you schedule a meeting.



Viewing upcoming scheduled MaX Meetings

Pressing the Upcoming Meetings button displays details of any meetings already scheduled, and has options that enable you to make various changes if the meeting is scheduled for today, or if it is a recurring meeting:

- click START to begin the meeting
- click on a meeting to open a screen that allows you to start the meeting immediately, even if it has been scheduled for a different time
- edit the meeting settings
- invite more participants
- delete the meeting.



Figure 15: Upcoming MaX Meetings on mobile devices

Starting a MaX Meeting on MaX Mobile

To begin an instant or scheduled MaX Meeting, click the **Start Meeting** option. The MaX Mobile then displays the **Waiting for Meeting** screen that shows the contact(s) who have yet to accept the invite. The MaX Meeting will start as soon as the first invitee accepts the invite. While waiting for this to happen, the MaX Meeting creator also has the option to start the meeting immediately or cancel the meeting invite.

Once the MaX Meeting is in progress, and if you have Instant Messaging, you can invite other IM enabled contacts to join the meeting from various locations in the MaX Mobile UI. You can also invite non-IM-enabled participants to join a MaX Meeting that is already in progress by clicking on the **Invite Others** tab where will you find the **Sent Invite Link via Email** and **Copy Invite Link** options.



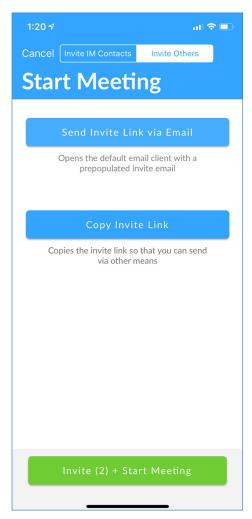


Figure 16: Inviting other participants to a MaX Meeting

You can also uplift a MaX Mobile call to an instant MaX Meeting, providing you are only in a single call with an IM-enabled caller. When a call can be uplifted to a MaX Meeting, the meeting icon appears alongside the other options on the in-call panel. If the call cannot be uplifted to a MaX Meeting, for example because it is a three-way call or the contact does not have an IM address, the meeting icon will be disabled. An error message will be displayed if the user taps the meeting button that explains why the call cannot be uplifted to a MaX Meeting.



2.1.3 Participating in a MaX Meeting

Joining a MaX Meeting

There are a number of ways in which invited participants can join a MaX Meeting.

• Participants with MaX Webinar or Mobile with Instant Messaging can join a MaX Meeting by responding to an on-screen invitation while using their desktop or mobile device.



Figure 17: Meeting invitation on Desktop

In addition to providing links to join the MaX Meeting or reject the invitation, the invitation also allows you to use a drop-down to open a chat window and send an Instant Message to explain why invitees cannot join the meeting.

- You can also use the **Join a Meeting** option on the **Meetings** menu of the MaX Webinar or Mobile UI.
- Meeting participants who are not MaX Webinar or Mobile users receive the joining details of the MaX Meeting by another means, for example in the email automatically generated by MaX Webinar, MaX Mobile or the Stand-alone MaX Meeting client, or by SMS. They can join a meeting by clicking on the login details in an email invitation, or entering the meeting URL in a browser.

If the invited participant has not yet installed the MaX Meeting client, this will be seamlessly installed as they join the meeting and the MaX Meeting UI will be launched. There is no separate login to MaX Meeting.

The MaX Meeting host can configure the MaX Meeting so that all new participants are put in a waiting room when they enter the meeting. The host must then manually admit these participants into the meeting.

Participants in a MaX Meeting who have MaX Webinar should see their MaX Webinar avatar in the MaX Meeting UI. All other participants will use the default MaX Meeting avatar. MaX Meeting hosts and participants can change their display name by hovering over their name in the **Participants** panel.

Once in a meeting, all participants can use the MaX Meeting UI to invite more contacts.

However, MaX Meetings are limited to a maximum number of attendees. Participants must only invite contacts up to their permitted limit. A contact will not be able to join a meeting if the meeting already has the maximum permitted number of attendees.



MaX Meeting features

Participants in a MaX Meeting may have access to the following features, accessed on the bottom ribbon of the MaX Meeting screen.

While the meeting is in progress, the MaX Meeting host has additional control over the meeting settings.

- The meeting host can make changes to the settings of individual participants, for example to mute someone or make one or more participants the host or co-host of the meeting.
- The meeting host can control the behavior of the meeting as whole, for example to mute all participants, lock the screen sharing feature, or prevent the recording of sensitive data.

Chat

Once in the meeting, participants can chat with another participant in a one-to-one conversation, or send a chat message to all the participants. Participants do not need to have MaX Webinar or MaX Mobile Instant Messaging to chat with other meeting participants.

Screen sharing

Unless the meeting host has locked the screen share option, all participants can share material with the other participants. The range of material that they can share depends on the platform they are using to attend the MaX Meeting, but may include:

- their desktop
- a specific application window
- a whiteboard that all meeting participants can annotate using various tools, including a text tool box participants can save the whiteboard as a PNG image within MaX Meeting or take a screenshot to save the whiteboard data
- a document from Dropbox or similar document sharing website
- · a webpage.

Once a screen has been shared, all participants can annotate the screen, unless the meeting host has disabled annotations. The screen sharer can also set another user to have remote control of the shared screen or window.

Audio and video options

Participants can either use their computer audio, or dial in from a phone. When joining by phone, remember to enter your participant ID to avoid using more than one participant slot. They can also turn their video on or off.

When participating in a meeting on a desktop computer, an iPad or an Android phone, a participant can use the pin video feature to disable active speaker view, and view and record just a single speaker. If the participant has a dual monitor, they can pin a second video on the other screen.

Pinning video in this way only affects the participant's local view and not the view of the other participants in the meeting.

If the MaX Meeting host enables the feature when creating the MaX Meeting, all participants on desktop computers can share a camera connected to their computer, enabling two cameras to be used at once in a MaX Meeting.



MaX Meeting also supports stereo audio.

An MaX Meeting can be recorded by a participant and saved locally, unless the MaX Meeting host has disabled recording. This recording can also be paused or stopped during the meeting if the participant is using a desktop computer. Users can access recordings of previous meetings through the MaX Meeting interface.

Headset button support

Users on supported OS versions can choose to integrate supported models of Plantronics and Jabra headsets so that the mute and call buttons on the headset can be used for MaX Webinar calls. If these users have enabled this headset support, the headset buttons can also be used with MaX Meeting.

- When participants receive an incoming meeting invitation, the headset plays the ringtone from MaX and may also flash or vibrate. The participant can join the meeting by pressing the call button on the headset.
- On joining the meeting, the headset mute state is updated to match the mute state on MaX Meeting. For example, if the host has chosen to mute all participants as they join the meeting, the headset mute button will be turned on.
- During the meeting, participants can use the mute button on their headset to mute/unmute themselves.
- Participants can use the headset call button to leave the meeting.

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.

Closed caption

If closed caption is enabled by the MaX Meeting host when creating the MaX Meeting, the host can type captions during the meeting. If they wish, they can also assign the captioning to another participant in the Meeting.

Breakout sessions

Participants in a MaX Meeting on a desktop computer can split an ongoing MaX Meeting into up to 50 breakout sessions, with a maximum of 200 participants in a session (if the user has the appropriate license to create large MaX Meetings). Users can be moved between breakout sessions once they have been created.

Although mobile participants cannot initiate a breakout session they can be invited to join one that has already been created.

Presence

When a user is in a MaX Meeting, their Presence will be shown as On the Phone, unless they have explicitly set their Presence to a more important state, for example Do Not Disturb.



Hot keys

When participating in a MaX Meeting using a desktop computer, participants can use hot keys to:

- enable/disable the microphone or video
- · switch camera
- share screen
- start/stop/pause/resume local and cloud recording of the meeting
- enter full screen
- mute/unmute all participants.

2.1.4 MaX Meeting settings

MaX Meeting allows participants to make various changes to the default settings for creating and joining MaX Meetings.

Settings for MaX Webinar users

If you are using MaX Webinar alongside MaX Meeting, MaX Meeting settings are accessed on the Desktop UI by following **Tools->Options** and selecting the **Meetings** screen. This screen also appears when you click on the **Settings** option on the MaX Meeting UI toolbar.



Figure 18: MaX Meeting settings on the MaX Webinar UI



In addition to using the check boxes to select a range of configuration options, the MaX Webinar user can:

- click on Edit to edit the Subject line and some of the text in the MaX Meeting email invitation and use the dropdown to select the default language used in these emails
- view the dial-in numbers used for MaX Meetings
- click the Advanced Settings button to access a range of further MaX Meeting configuration options on a MaX Meeting screen, including the Personal Meeting ID and Personal Link that they can choose to use for scheduled meetings. The user must have already created at least one MaX Meeting before they will see this button on the MaX Webinar UI.

MaX Meeting Webinar features

MaX Meeting Webinars are very similar to normal MaX Meetings but offer the following additional features:

- They support much higher attendee limits. Users can create MaX Meeting Webinars for up to 100, 500, or 1,000 attendees, with up to 100 panelists able to share video. The other attendees are view-only, but can use a chat feature or participate in Q&A sessions and polls instigated by the webinar host.
- They offer a registration process to track attendance, for example requiring attendees to register before they can view the webinar.
- MaX Meeting Webinars can be branded. Users creating a webinar have the option to upload a banner and logo that is used on invitation screens and on emails sent out to participants.
- MaX Meeting Webinar hosts can conduct in-meeting polls and Q&A sessions.
- The MaX Meeting Webinar host can use the **Report** tab on the Webinar UI to generate a range of reports in .csv format, including reports showing the number of registrations or attendees for a particular webinar, the performance of the webinar (for example audio quality), and the results of any Q&As or polls conducted during the webinar.

Limitations

MaX Meeting Webinars have the following limitations.

- They can only be created by users who are members of a Business Group who have MaX Meeting and an appropriate MaX Meeting Webinar license allocated to their Business Group line.
- They cannot be managed from MaX Mobile. Links to create MaX Meeting Webinars appear only in the MaX Webinar and CommPortal Web Uls.

2.2.1 Setting up a MaX Meeting Webinar

Business Group users with MaX Meeting and a suitable license can use the MaX Meeting Webinar UI to set up a webinar.

Business Group users must have MaX Meeting enabled and have been allocated a MaX Meeting Webinar license before they are able to set up a webinar.

Business Group users can see what MaX Meeting Webinar licenses they have by clicking the **Allocated Licenses** link on the CommPortal Home page.



Personal Details Joe B. New Prod MGMT Admin Devices Allocated Licenses Set Emergency Location

Figure 19: Allocated Licenses link on the CommPortal Home page

Clicking on this link launches a pop-up that displays the licenses currently allocated to this user. The number alongside the license type indicates the attendee limit.



Figure 20: Allocated Licenses pop-up

Accessing the MaX Meeting Webinar UI

Users can launch the MaX Meeting Webinar UI from CommPortal or MaX Webinar by clicking on a **Manage My Webinars** link.

- In CommPortal Web, this link is accessed from the drop-down on the **Start** button.
- On the MaX Webinar UI, this link is accessed on the **Meetings** menu.

The user then sees the following **My Webinars** management UI in their browser window.



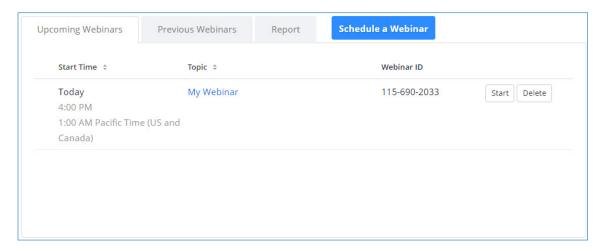


Figure 21: My Webinars screen

This allows the user to view any upcoming or previous MaX Meeting Webinars, view any existing reports from MaX Meeting Webinars, and click on the **Schedule a Webinar** tab to launch the screen where they can schedule a new one.

Scheduling a MaX Meeting Webinar

The **Schedule a Webinar** screen allows the MaX Meeting Webinar host to enter the initial details for the MaX Meeting Webinar.



Topic	My Webinar			
Email:	Webinar@AireSpring.com			
Description (Optional)	This is a test webinar.			
When	05/09/2019 == 1:00 v AM v			
Duration	1 v hr 0 v min			
Time Zone	(GMT-7:00) Pacific Time (US and Canada)			
	☐ Recurring webinar			
Registration	□ Required			
Video	Host			
	Panelists On Off			
Audio	○ Telephone ○ Computer Audio ● Both			
	Dial from United States Edit			
Webinar Options	Require webinar password			
	■ Q&A			
	■ Enable Practice Session			
	Record the webinar automatically on the local computer			

Figure 22: Schedule a Webinar screen



Once the MaX Meeting Webinar host has entered all the details, they should press **Schedule.**

This then launches another screen where they can make any changes to the details they have just entered, add the webinar to their calendar, upload any branding images, make changes to other webinar settings, and start the webinar.

- The first panel on this new screen shows the details for the MaX Meeting Webinar that they have just entered. The MaX Meeting Webinar host can press **Edit** to change any of these.
- This panel also includes a dropdown so that the MaX Meeting Webinar host can add the webinar to their calendar.
- The **Branding** panel allows the MaX Meeting Webinar host to upload or change a banner image that will be displayed at the top of the webinar's invitation page and a logo that is shown on the invitation and registration pages and in the email invitation sent out to attendees.
- The remaining panels allow the MaX Meeting Webinar host to manage other aspects of the webinar:
- Edit the list of panelists.
- Manage the attendees.
- Edit the invitation, confirmation, reminder and follow-up emails that can be sent to the attendees.
- Edit any polls that they may already have created.

Attendee registration

The MaX Meeting Webinar host can use the **Registration** screen to configure any requirements for registering for the webinar.



egistration				
Registration	Questions	Custom Questions		
Registration				
Required				
Approval				
Automatica	ally Approve			
Ü	,	receive information on hov	v to join the webina	r.
Manually A				
The organiz to join the v		egistrants before they rece	ive information on	how
Notification				
	nail to host when s	omeone registers		
Other options				
_	tration after event			
	dees to join from r			
✓ Show socia	l share buttons on	registration page		
Tracking Pixel				
	s are little 1x1 pixel r website or see yo	images that allow you to k our advertisement.	eep track of how m	any
Add to registra	ation page (Optiona	al)		
www.test.co	m			
Add to registra	ntion successful pa	ge (Optional)		
www.test.co	m			
			Save All	Cance

Figure 23: Webinar Registration screen

The MaX Meeting Webinar host can use the radio buttons and check boxes to select:

- whether or not attendees must register in advance for the webinar
- whether registration is approved automatically or manually
- to receive an email notification when registrations are completed.

The **Questions** tab allows the MaX Meeting Webinar host to add registration fields, for example to require the attendee to provide details of their role or location.

The **Custom Questions** tab allows the MaX Meeting Webinar host to compose their own questions to which the



attendee may either enter a short answer or select from multiple choice answers provided by the MaX Meeting Webinar host. For example, the MaX Meeting Webinar host might like to ask questions to try and find out why the attendees want to attend the webinar.

The MaX Meeting Webinar host can view and approve registrants using the Webinar UI.

An attendee registers for a MaX Meeting Webinar by entering the webinar URL in a browser and completing the required fields. Once their registration is approved, if approval is required, they will receive an email confirming their attendance and providing joining information.

Emails to attendees

The MaX Meeting Webinar host can choose to send a variety of emails to webinar attendees, including:

- A confirmation email after registration has been completed.
- A reminder email sent to potential attendees before the webinar begins.
- A follow-up email to attendees, sent after the webinar.
- A follow-up email to non-attendees, sent after the webinar.

The MaX Meeting Webinar host can use the **Report** tab on the MaX Meeting Webinar UI to generate a range of reports in .csv format, including reports showing the number of registrations or attendees for a particular webinar, the performance of the webinar (for example audio quality), and the results of any Q&As or polls conducted during the webinar.

Starting the MaX Meeting Webinar

The MaX Meeting Webinar host starts the webinar using the My Webinars management UI illustrated in **Figure 21: My Webinars screen** on **page 20**.

The MaX Meeting Webinar host simply navigates to the **Manage Webinars** screen for the webinar, and clicks the **Start** button.

The MaX Meeting Webinar UI

Once the MaX Meeting Webinar has started, the host sees a UI that is very similar to the MaX Meeting UI described in **MaX Meeting** on **page 3**. The only difference is that they have additional features exposed on the bottom control bar: the Q&A chat facility and the Polls feature are specific to MaX Meeting Webinars.



Figure 24: MaX Meeting Webinar host UI



MaX Meeting Webinar attendees are view-only participants. They have controls at the bottom of the MaX Meeting Webinar screen that enable them to adjust their audio settings, take part in Q&A chats, send chat messages to all attendees or privately to the MaX Meeting Webinar host, or click on **Raise Hand** to get the attention of the MaX Meeting Webinar host.



Figure 25: MaX Meeting Webinar Attendee menu bar