Northland
COMMUNICATIONS

April 5, 2024

MaX Meeting

Video Conference

USER MANUAL

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WHAT IS MaX MEETING?

MaX Meeting is a web conferencing and collaboration tool that enables you to set up audio and video conferences using MaX UC Desktop. If you have a Premium User license and have MaX UC Desktop or Mobile downloaded, MaX Meeting is automatically included – nothing additional to download.

MaX Meeting was formerly Accession Meeting and you may see the term Accession in some areas of the application.

MaX Meeting is a web client that allows attendees (join only) to join a "Powered by Zoom" meeting or webinar without downloading any plug-ins or software. However, the web client has limited features and works best with Google Chrome. See Web Browser Compatibility for limitations.

You can start a MaX Meeting on the MaX UC Desktop Application, on the MaX UC Mobile Application, using CommPortal or if you are using a PC with Outlook, you can download an Outlook Plug-in and start a meeting from Outlook.

Although you need MaX UC Desktop to set up the meeting, invited participants do not need to have it.
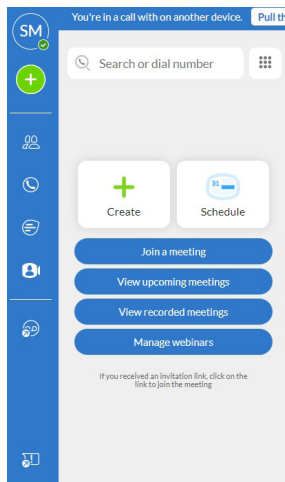
Once a meeting has started, all participants can:

+ Invite other participants
+ Send chat messages to the whole meeting or an individual participant.
+ Share their desktops with all other participants.

These participant tools can be restricted by the host. See Advanced Meeting Settings.

ACCESS THE MEETINGS MENU

Click on **Meetings** at the left of the MaX UC Desktop UI.

The Meetings menu allows you to:
+ View any upcoming meetings that have already been scheduled.
+ Schedule a meeting for a specified time with one or more contacts.
+ Join an existing meeting by entering a Meeting ID in the pop-up that appears when you select this option.+ View recordings of previous meetings.
+ Create a meeting by inviting one or more of your contacts to join you in an instant MaX Meeting.
+ Manage Webinars. (Requires a MaX Webinar license).

MEETING ROOM PROPERTIES

Each of the meeting setup options creates a MaX Meeting with its own unique Meeting ID that identifies it. Participants can use this ID to specify which meeting they are joining.

When you start an instant meeting or schedule a future meeting, you are automatically assigned as the host and a Meeting ID is assigned to identify the meeting.

NOTES: Once created, a Meeting ID for an instant meeting is valid for 24 hours, the Meeting ID for a scheduled meeting is valid for 30 days and the Meeting ID for a scheduled recurring meeting is valid for 365 days.

You can use a Personal Meeting ID rather than using the one that is automatically generated.

MaX MEETING SETTINGS

You can access meeting settings through the **Profile** menu in the MaX UC Desktop App. This provides you with an interface to select options for what happens when you join and participate in a MaX Meeting.

Select: **Profile > Settings > Meetings**

On a MAC Select: **MaX UC > Preferences**

Join Section provides options to customize what you want to happen when you join a meeting.
Scheduling + Invites Section shows the Dial-in number provided by Northland Communications.
In this section, you can customize the email invite participants receive and change the language if necessary.
+ By default, there is a "canned" email that says "(Your Name) is inviting you to join a meeting".
+ Click **Edit** to customize your own message.
+ Scheduling Assistants can be set up to allow others to set up meetings on your behalf. They will automatically be included in the meeting if they are scheduling on your behalf.
Meeting Section provides options to customize how your screen displays during the meeting.
Outlook Plug-In downloads a plug-in for Outlook users for easy access to create or schedule meetings directly from Outlook.
Advanced Settings opens a link in your browser to provide additional meeting options. Each has specific detail and can be turned on and off with the click of a button. See Advanced Meeting Settings for more information.

CREATE MEETING INVITES

GET STARTED

You can create, schedule and join meetings from any device that has the MaX UC application including: MAC, PC, iPhone, Android and Outlook. You can also view upcoming meetings or recorded meetings.

You can join meetings from any telephone or computer even without the MaX UC Application.

VIEW SCHEDULED MEETINGS

From the **MEETINGS** tab, select **VIEW UPCOMING MEETINGS.** A list of all the meetings you have created is displayed.
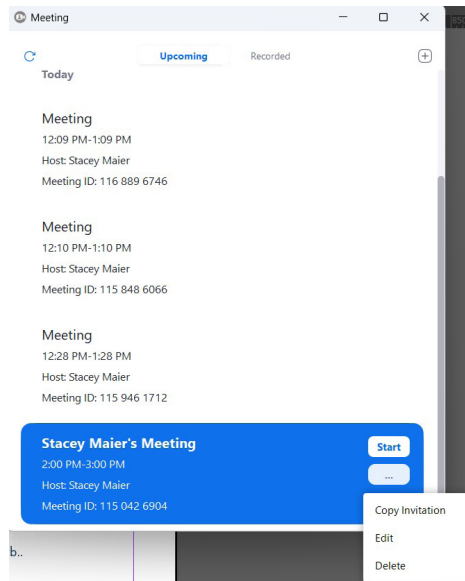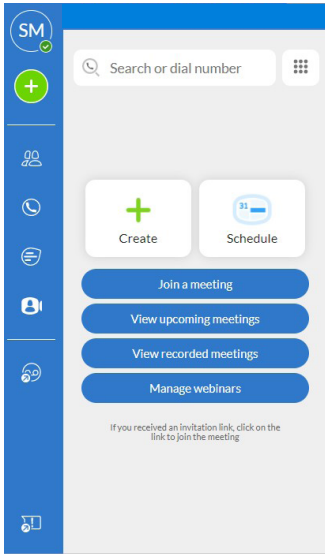
+ You can **Start**, **Edit** or **Copy** the meeting from this view.

WORK WITH RECORDED MEETINGS

When you have recorded meetings, you can work with them from this view or from the **Meetings** tab..
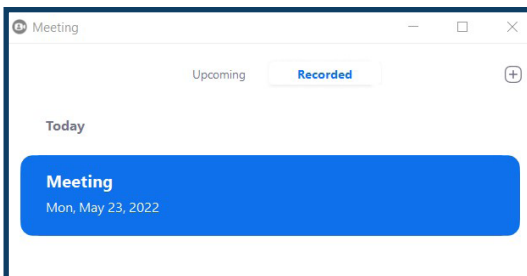
+ Select **Recorded** to view meetings that you previously recorded.

+ You can also select **View Recorded Meetings** from the **Meetings** tab.

+ Click the plus sign to schedule a new meeting.

iPHONE AND ANDROID APP

The **Meetings** tab on iPhone and Android devices and tablets provide most of the same options as the desktop application.
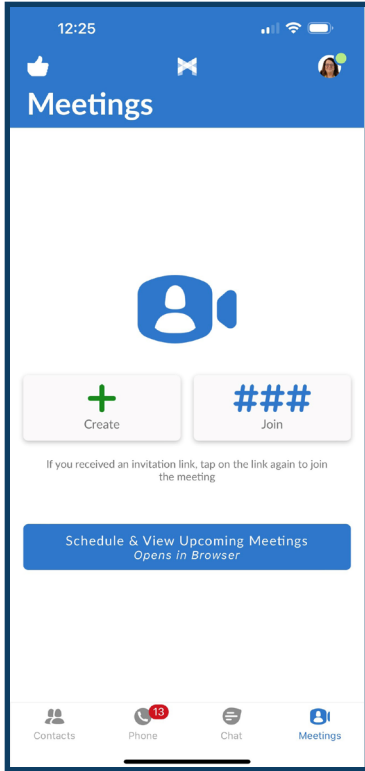
NOTE: There is not an option to record or view recorded meetings on the mobile app.

OUTLOOK PLUG IN

By downloading the Outlook Plugin from MaX UC Desktop, you can schedule a meeting, start an instant meeting and set options directly from your Outlook task bar.

To Download the Plugin, in your MaX UC Desktop application, go to **Profile > Settings > Meetings**.
Select **Download Outlook Plugin** and follow the prompts. There is no option for this on a MAC.
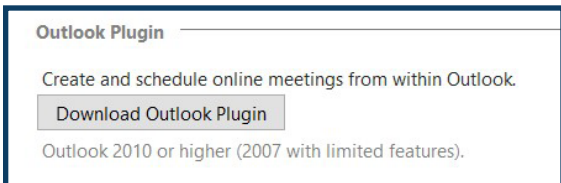
Once the download is complete, you will see the options to schedule a meeting or start an instant meeting in your Outlook task bar.
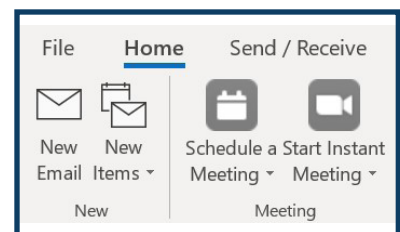
START AN INSTANT MEETING

From the desktop app, mobile app or Outlook Plug-in go to the **Meetings** tab and click **Start Meeting** or **Create Meeting**. Refer to the MaX UC Mobile User Manual at northland.net/support for information on using the Mobile Meeting tools. The interfaces will look slightly different between devices, but the actions are the same.

Desktop App
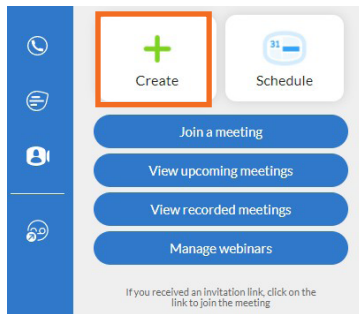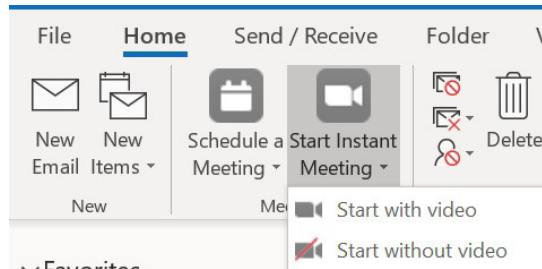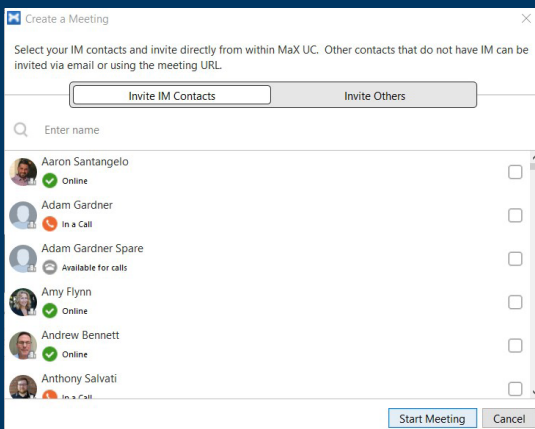
Outlook Plug in

Select participants from your IM contacts and select **Start Meeting**.

Invite Others: to invite participants from outside your Business Group.
Select **Copy Meeting Link** to copy the link to the clipboard to be sent via text, chat or email.

Stacey Maier invites you to attend this Meeting.

Join by URL:

https://buvideo.accessionmeeting.com/j/1161267745

Or join by phone:

315-671-1981
Meeting ID: 116 126 7745

Or join from a H.323/SIP room system:

Dial: 162.255.37.100 or 162.255.36.100
Meeting ID: 116 126 7745

Select **Send Email Invite** to open an email invitation with all the information for the meeting. Enter emails addresses and select **Send**.

Once the information is sent, select **Start Meeting.**

Participants will join as they receive the invitation.

NOTES: When creating an instant meeting, and waiting room is turned off, the host recieves a banner at the top of MaX UC stating the meeting will start once the first participant joins.
When a participant declines the meeting, a red banner appears at the top of MaX UC stating the participant declined.

SCHEDULE A FUTURE MEETING

From the desktop app, mobile app or Outlook Plug-in go to the **Meetings** tab and click **Schedule Meeting.**

The interfaces will look slightly different between devices, but the actions are the same.
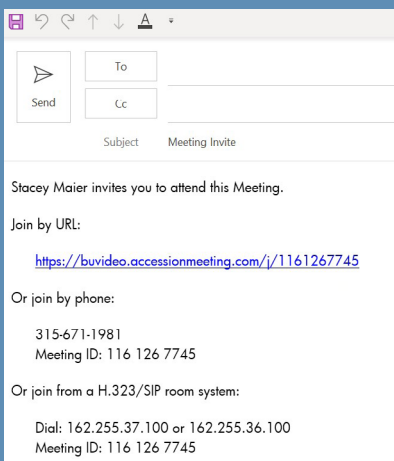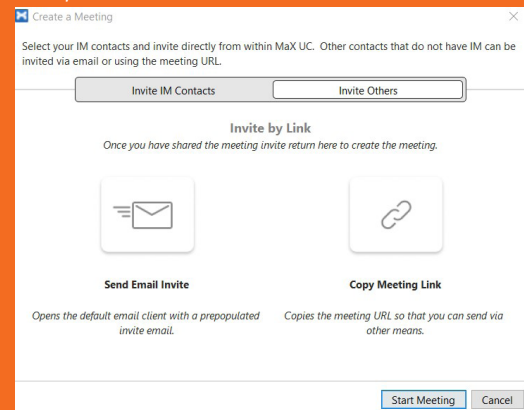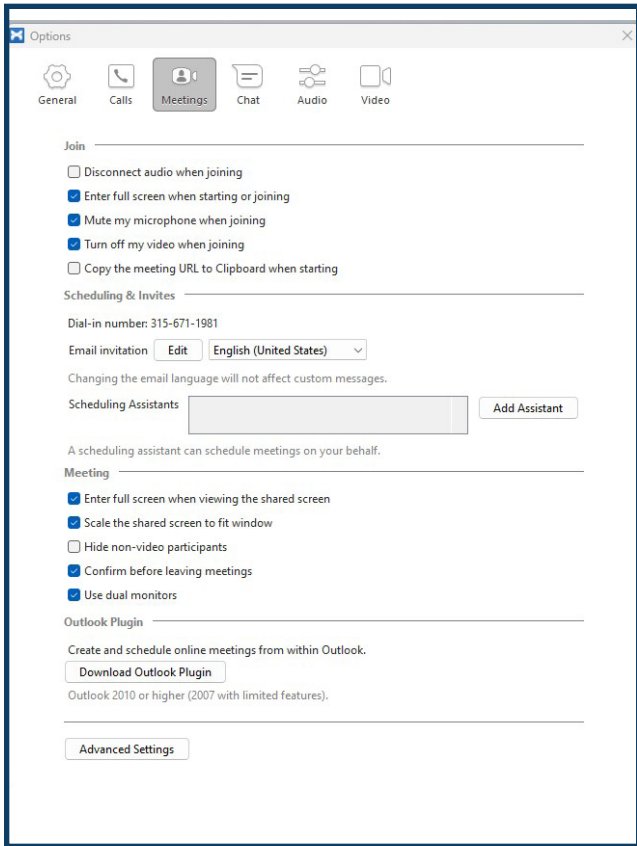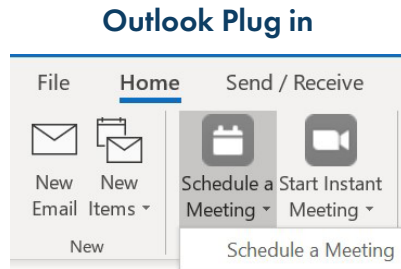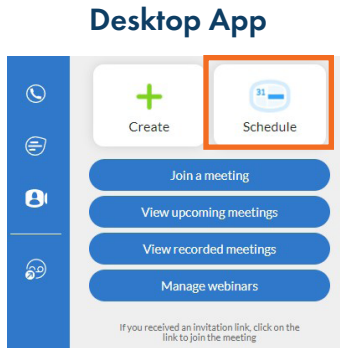
Desktop App

Outlook Plug in

+ Your name is entered as the topic by default. The topic can be edited.
+ Complete the date, time and duration fields.
+ Indicate if this is a recurring meeting. You will be reminded to complete the "Recurring section" of the email invite.
+ Select to use an automatically generated meeting ID or your personal meeting ID.
+ If participants are required to enter a password, check the box. A box will pop up for you to enter a password of your choosing. Check the box is you want participants to be placed in the waiting room until you grant them access.
+ By default, video is off when joining for both host and participants. You can turn this option on.
+ Choose the audio options. Default is both Telephone and Computer Audio.
+ Choose which calendar to use and click **Schedule** if you are not using any advanced options.
  See Advanced Meeting Options.

NOTE: When an attendee for either an instant meeting or a scheduled meeting declines, a banner is seen at the top of your MaX UC. Cllick the X to close the notification.

ADVANCED MEETING OPTIONS

Select the dropdown next to ADVANCED OPTIONS to view them.

Advanced Options ^
- ☑ Enable join before host
- ☐ Mute participants upon entry
- ☐ Automatically record meeting on the local computer
- ☐ Schedule for:
  - Training Video Meeting ⌄

[Save] [Cancel]

+ **Enable join before host:** Allow participants to join before host.
+ **Mute participants on entry:** Mute participants when they join.
+ **Automatically record meeting on local computer:** Select to have the meeting record on start. **
+ **Schedule for:** When you are a scheduling assistant for others, their names will appear in the dropdown. Select if you are scheduling the meeting on someone else's behalf.

IMPORTANT: Call recording and video call recording laws from each state and country will differ from one another. They will require either One-Party consent or All-Party consent. Northland does not offer legal advice, you should consult your legal counsel for guidance on the compliance activities that are appropriate for your organization.

NOTE: Join before host is disabled by default when scheduling and creating meetings. If this is enabled, any valid meeting could be started without the host's permission.
When scheduling a meeting you are not attending, you can override this in the meeting settings.
When allowing participants to join before host, you should manually set a password and participants should be required to enter a password when joining.
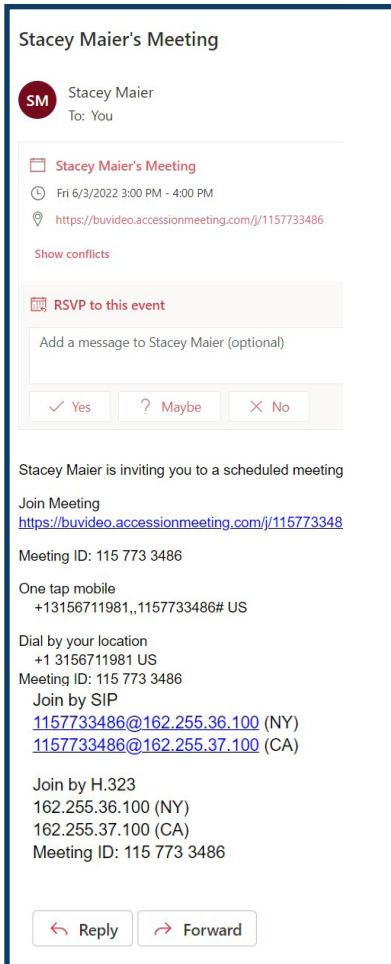
Once you click **Save**, the meeting invite opens from Outlook so that you can address it to both required and optional participants.

| File | Meeting | Scheduling Assistant | Insert | Format Text | Review | Help | ♀ Tell me w |

ⓘ You haven't sent this meeting invitation yet.

⮞ Send

Title	Stacey Maier's Meeting
Required	
Optional	
Start time	Mon 7/20/2020 4:00 PM ☐ All day 🌐 Time zones
End time	Mon 7/20/2020 5:00 PM ⟳ Make Recurring
Location	https://buvideo.accessionmeeting.com/j/1164964382

Stacey Maier is inviting you to a scheduled meeting.

Join by URL:

   https://buvideo.accessionmeeting.com/j/1164964382

Or iPhone one-tap :

   +13156711981,,1164964382# (US Toll)

Or join by phone:

   Dial: +1 3156711981 (US Toll)
   Meeting ID: 116 496 4382

Or join from a H.323/SIP room system:

   Dial: 162.255.36.100 (NY) or 162.255.37.100 (CA)
   Meeting ID: 116 496 4382

+ Enter the email addresses for required and/or optional participants.
+ You can edit dates, times and recurrence from this screen.
+ Edit the Title, or add text to the body of the email.

NOTE: If you add anything to the location make sure the meeting link isn't deleted.

JOIN A MEETING

To join a scheduled meeting, do one of the following from the calendar invite.

Stacey Maier's Meeting

SM Stacey Maier
To: You

📅 Stacey Maier's Meeting
🕐 Fri 6/3/2022 3:00 PM - 4:00 PM
📍 https://buvideo.accessionmeeting.com/j/1157733486
Show conflicts

📇 RSVP to this event

Add a message to Stacey Maier (optional)

✓ Yes   ? Maybe   ✕ No

Stacey Maier is inviting you to a scheduled meeting

Join Meeting
https://buvideo.accessionmeeting.com/j/115773348

Meeting ID: 115 773 3486

One tap mobile
  +13156711981,,1157733486# US

Dial by your location
  +1 3156711981 US
Meeting ID: 115 773 3486
  Join by SIP
  1157733486@162.255.36.100 (NY)
  1157733486@162.255.37.100 (CA)

  Join by H.323
  162.255.36.100 (NY)
  162.255.37.100 (CA)
  Meeting ID: 115 773 3486

↩ Reply   ↪ Forward

+ Open the meeting invite and click or the blue URL.

+ From any telephone, dial the telephone number for the meeting and when prompted, enter the Meeting ID.

+ From a room system, dial the code listed for the meeting and when prompted, enter the Meeting ID.

+ Optionally, you can RSVP from the invitation. Select **Yes**, **No** or **Maybe**.

PARTICIPANT MEETING WINDOW

The meeting window opens upon entry. If the host has **Waiting Room** enabled, you will be placed in the waiting room and the meeting window will open when the host allows access.

Hover your cursor over the window to see options. By default, video is not displayed until you choose it or the host has set video to open upon entry.
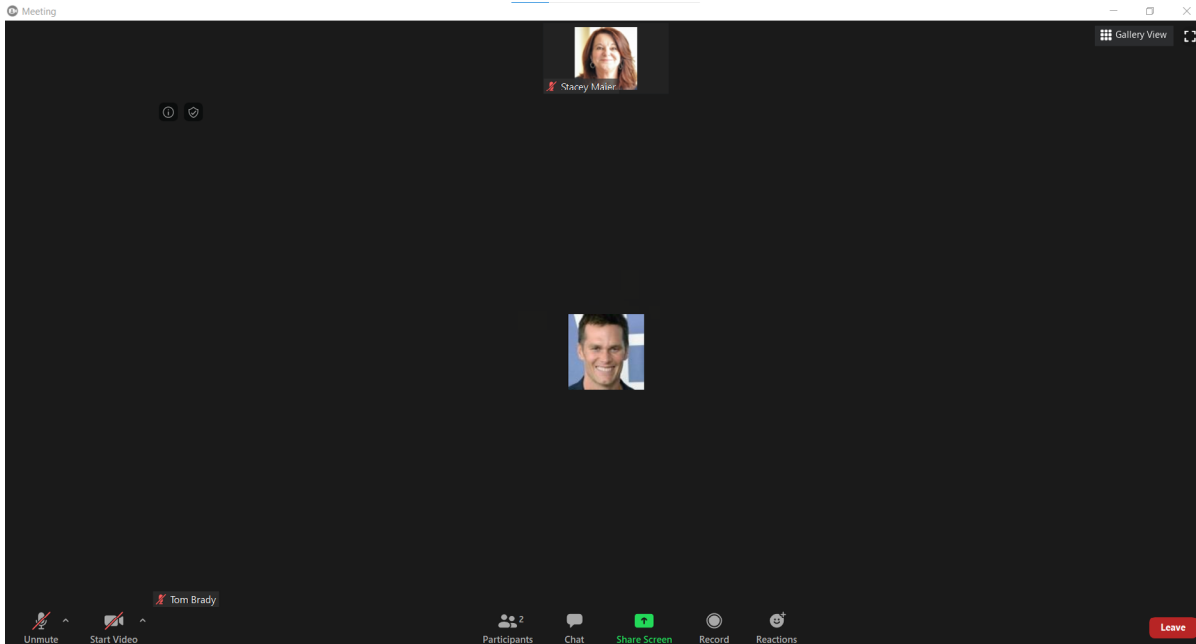
UPPER LEFT

Info will display the information for the Meeting, including the meeting ID, Participant ID and Meeting URL.
The Shield indicates the meeting in encrypted end to end.

UPPER RIGHT

Gallery View displays all participants in the same size window. Switch to **Speaker View** to see the speaker highlighted in a larger window.
Enter/Exit Full Screen toggles the meeting window in and out of full screen display.

BOTTOM TASK BAR (from left to right)

Mute to mute/unmute the microphone. Click the arrow to select and/or test your speaker and microphone and view additional audio settings.
NOTE: When you are muted, hold the space bar to unmute temporarily.
Stop/Start Video to toggle the video on or off. Click the arrow to select your camera, use a virtual background and view additional video settings.
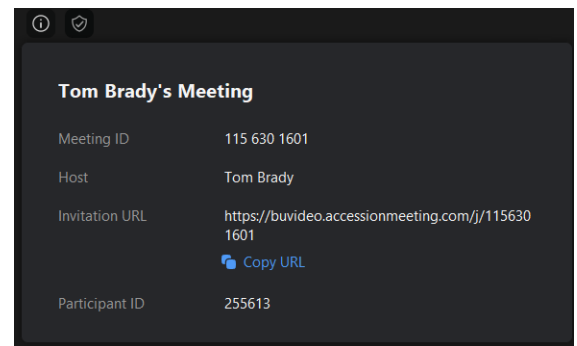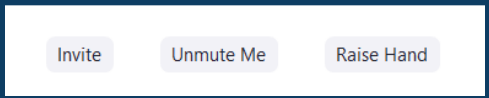
BOTTOM TASK BAR

Participants displays the number of participants. Click on it to view additional participant tools.


In the top portion of the participant window, you can view the other participants, **Mute/Unmute** yourself and toggle your video **On/Off**.
You cannot **Mute/Unmute** other participants or toggle others video **On/Off**.

In the bottom portion of the participant window, you can **Invite Others** to the meeting, **Mute/Unmute** and use the **Raise Hand** feature to let the host or others know you have something to say or ask. A raised hand appears next to your name in everyone's participant window.
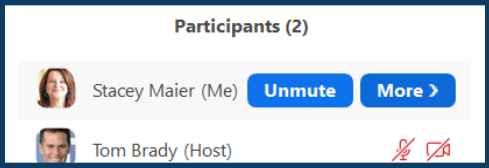
Hover over your name in the participant window to **Mute/Unmute** yourself. Click **More** to change your screen name or edit your profile picture.
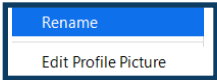
**Chat** opens the chat window. You can chat with the host, or the host and other participants when allowed by the host.
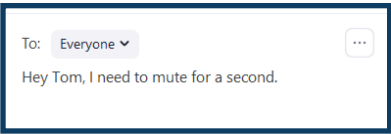
+ Click the dropdown next to **Everyone** to choose one participant.
+ Enter your chat and click **Enter**.
+ Click the three dots in the upper right to save the chat.

**Share Screen** opens the screen share options. See Screen Share.

Record records the meeting to your local device. When you are not the host, this must be allowed by the host. The host may have provided permission prior to the start of the meeting.
If not, when you click record, you will receive a message telling you to request permission from the host. The host will need to allow it from their host tools.
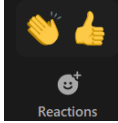
Reactions places an applause or thumbs up emoji on your video window.

Leave removes you from the meeting. You will get a confirmation window and you must confirm in order to exit the meeting.
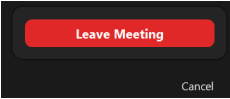
HOST A MEETING

Whether you host an instant meeting, or you join a scheduled meeting as the host, the meeting window appears the same.

To join a meeting do one of the following:

+ Open the meeting invite and click on the blue Join Meeting or the blue URL.

+ From any telephone, dial the telephone number for the meeting and when prompted, enter the Meeting ID.

+ From a room system, dial the code listed for the meeting and when prompted, enter the Meeting ID.

HOST MEETING WINDOW
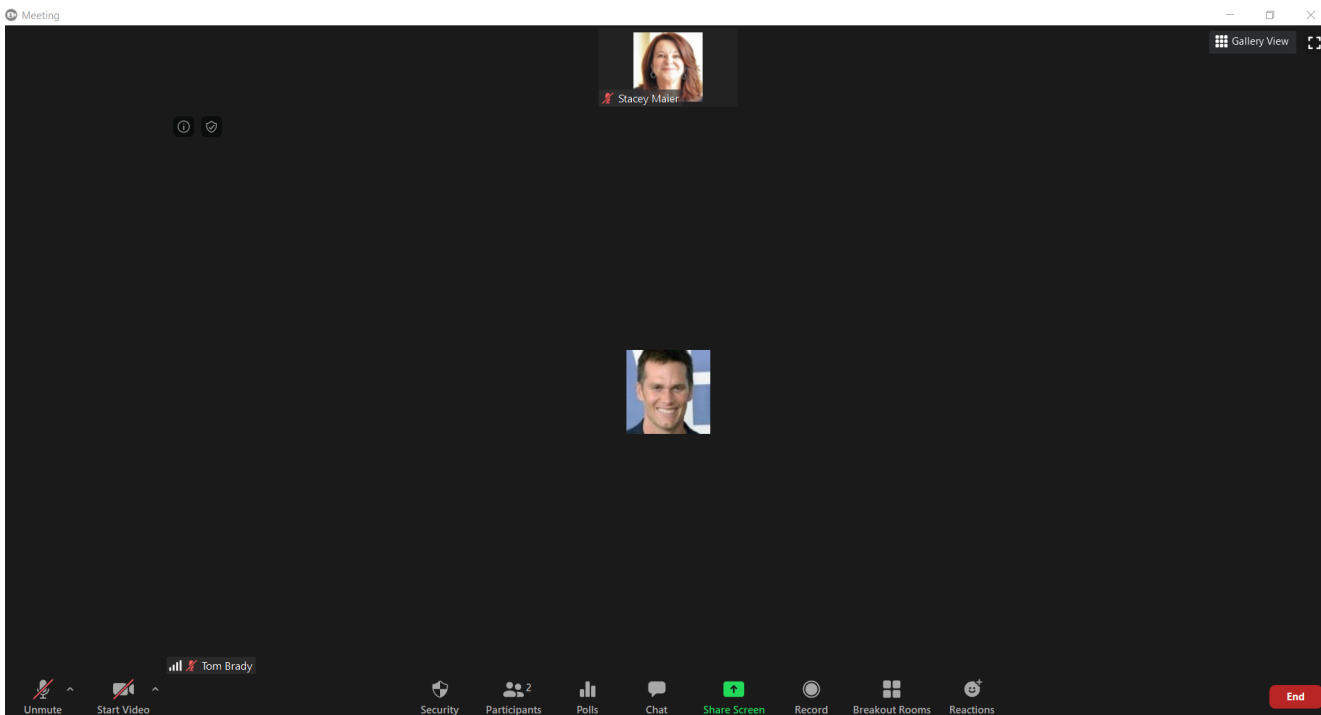
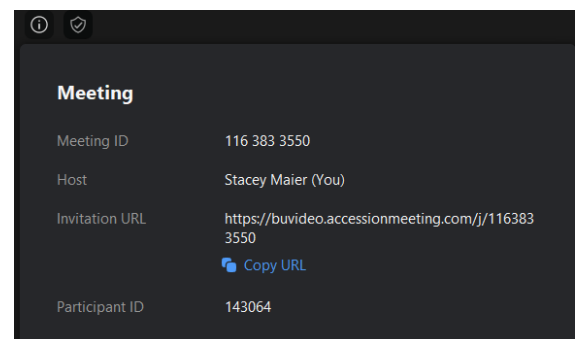The following options are available in the Host Window:

UPPER LEFT

Info will display the information for the Meeting, including the meeting ID, Participant ID and Meeting URL.
The Shield indicates the meeting in encrypted end to end.

UPPER RIGHT

Gallery View displays all participants in the same size window. Switch to **Speaker View** to see the speaker highlighted in a larger window.
Enter/Exit Full Screen toggles the meeting window in and out of full screen display.

HOST MEETING WINDOW

BOTTOM TASK BAR (from left to right)

Mute to mute/unmute the microphone. Click the arrow to select and/or test your speaker and microphone and view additional audio settings.

If you are using a compatible headset with MaX Meeting, you will need to go to your Audio settings on MaX UC and set the the option "Respond to Headset Buttons" to indicate whether you want to use the buttons on the headset for call control. It is important to note that if set as "Always", the computer is sending a signal to the headset and this will cause a delay in the response to mute/unmute.

If you are not using a headset, or if you don't want to experience the delay, make sure you have it set to "Never".

Stop/Start Video to toggle the video on or off. Click the arrow to select your camera, use a virtual background and view additional video settings.

Security click to Lock Meeting, Enable/Disable Waiting Room, Allow/Disallow partipants to Share Screen, Chat and rename themselves or, as the host, remove a participant.

**Participants** displays the number of participants. Click on it to view the participant window.
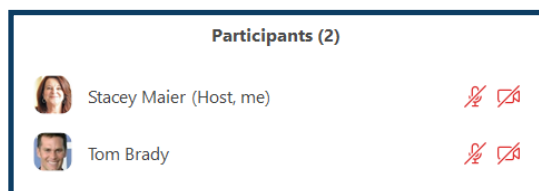
As the host, the following actions are available in the top of the participant window:
+ Click the microphone next to a participant to Mute/Unmute that participant.
+ Click the video next to a particpant to Hide/Unhide that participant video.
+ Hover over a participant and select **More** for additional actions.
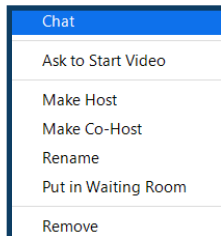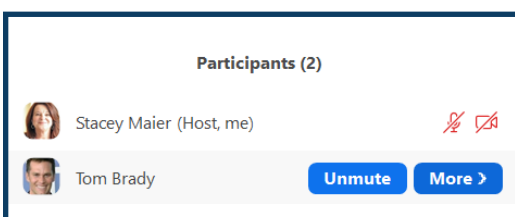
+ Open a Chat window.
+ Request to start participant's video.
+ Make the participant the host.
+ Make the participant a cohost.
+ Give the participant a name (can replace phone number).
+ Place the participant in the waiting room.
   See Waiting Room.
+ Remove the participant from the meeting.
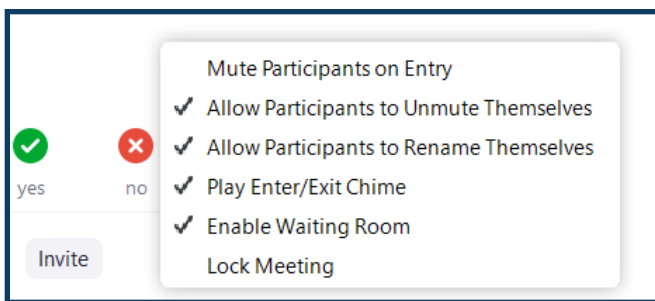
The following actions are available in the bottom of the participant window:
+ **Mute/Unmute** all participants
Click **More** to see the following additional options:
+ Mute all participants as they join the call.
+ Put attendees in the waiting room as they join the call.
+ Play a sound as participants enter and exit.
+ Lock the meeting so others cannot join.

Polls opens up a window to allow the creation of a poll or opens up a pre-created poll to launch. See Polling for more information on creating polls. Polls must be enabled in advanced settings. If it is not, you will not see this option.

Chat opens the chat window. You can chat with all other participants or an individual.
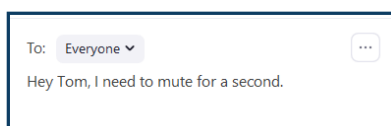
+ Click the dropdown next to **Everyone** to choose one participant.
+ Enter your chat and click **Enter**.
+ Click the three dots in the upper right to save the chat.

Share opens up the share window to enable you to share your screen or parts of your screen with participants. See Screen Share for screen share options.

Record will record the call to your local PC. You can access the recorded meeting from the Meetings tab in MaX UC.

Breakout Rooms moves participants into individual meeting rooms. Breakout Rooms will need to be enabled in advanced settings. If breakout rooms have not been enabled, you will not see this option. See Breakout Rooms.
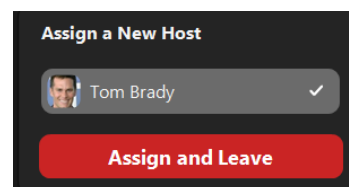
Reactions places an applause or thumbs up emoji on your video window.
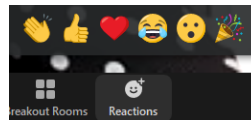
End will give you option to leave the meeting or end the meeting for all.
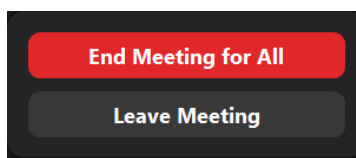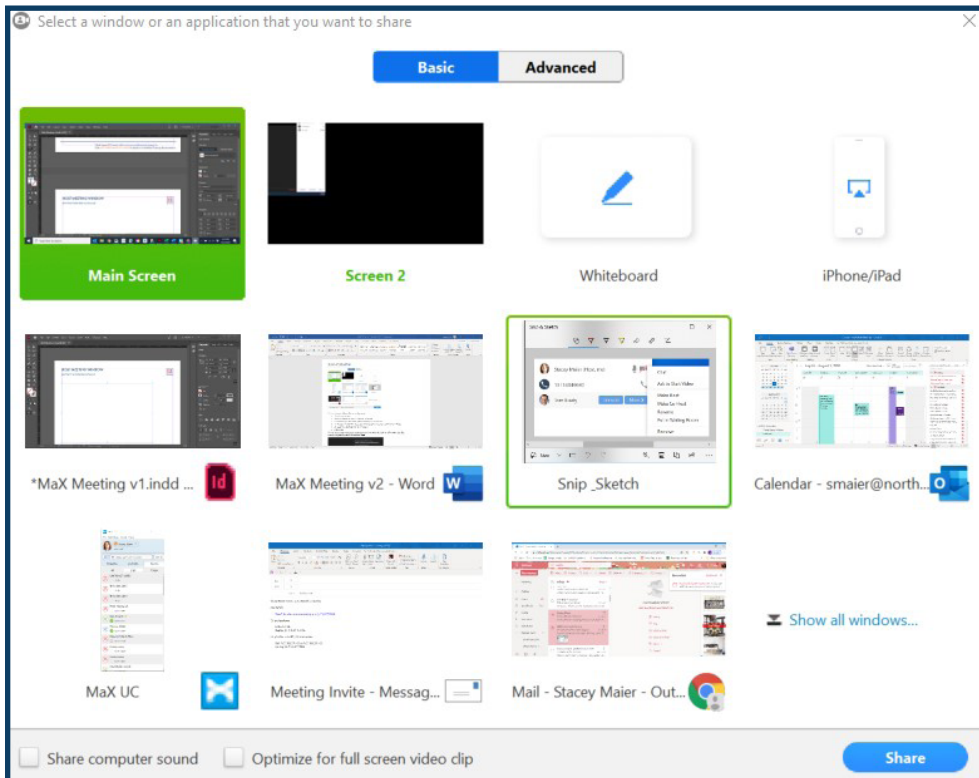
As the host, if you choose to leave the meeting, but wish it to continue, you need to assign someone as a host before you leave. If not host is assigned, you will receive a screen with a list of participants so you can assign one.

SCREEN SHARE

Select **Share** on the Meeting Task Bar at the bottom to see the screen share options.

You can choose what you share from this screen:
+ Your primary screen.
+ A second display or monitor if you are using one.
+ A whiteboard (a clean blank slate for collaboration purposes).
+ An iPhone or iPad (follow the screen mirroring options for your model iPhone or iPad).
**+** An application (such as MaX UC or Teams).
+ A document.
You can also choose to share your computer sound or optimize the video for full screen video clips. You should select these if you will be sharing videos.
Make the appropriate selection and click **Share**.

NOTES: By default, the meeting will display in "Gallery" view. Meeting participants will be displayed.
To change to "Speaker" view, click the **Speaker view** button in the upper right-hand corner of the display. The person who is speaking is then displayed.

Once in **Screen Share** mode, hover near the top to view additional share options.
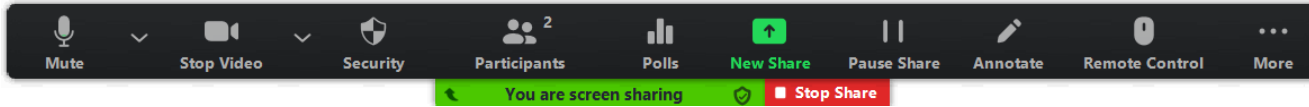
+ **Mute** mutes the audio. When muted, this will say **Unmute**.
+ **Stop Video** stops the video. When video is on, this will say **Start Video**.
+ **Security** provides options to Lock Meeting, Enable/Disable Waiting Room, Allow/Disallow partipants to Share Screen, Chat and Rename Themselves or as the host Remove a Participant.
+ **Participants** displays the same participant options as the option at the bottom of the display.
+ **New Share** changes what is being shared on the screen.
+ **Pause Share** temporarily pauses the shared screen.
+ **Annotate** brings up options for host or participants to notate on the shared screen.
+ **Remote Control** gives control of the mouse to another meeting participant.
+ **More** displays additional meeting options from the bottom task bar. See below.
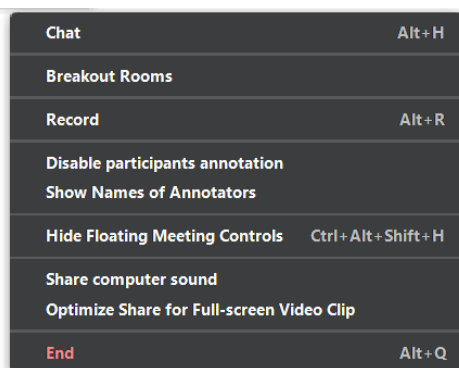
+ **Chat** opens the Chat window.
+ **Breakout Rooms** opens breakout room controls.
+ **Record** records the meeting.
+ **Disable participants annotation** prevents other participants from annotating the shared screen.
+ **Show Names of Annotators** displays the names of others that are annotating.
+ **Hide Floating Meeting Controls** removes the meeting controls from the shared screen.
+ **Share computer sound** share audio from videos.
+ **Optimize Share for Fullscreen Video Clip** provides the best quality when sharing a video.
    NOTE: This should be turned off when you are not sharing a video.
+ **End** will prompt you to leave the meeting.

+ **End Meeting** for All ends the meeting for all participants.
+ **Leave Meeting** exits the meeting for yourself only.
NOTE: As the host, if you want the meeting to continue, you will need to assign a new host before you leave.
+ **Cancel** returns you to the meeting.
+ **Stop Share** ends the screen share.
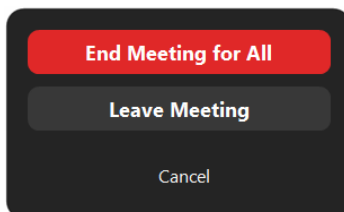
WHITE BOARD OPTIONS

When you share a Whiteboard, it is a blank slate. The Host and/or participants can draw, write and type on it. Hover near the top to view the whiteboard options.
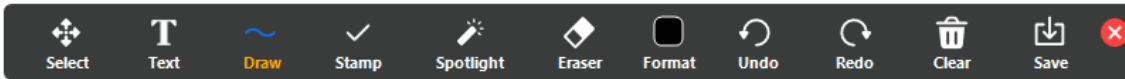
+ **Select** selects items on the board.
+ **Text** creates a text box to enter text into.
+ **Draw** gives options to draw various lines and shapes.
+ **Stamp** provides a selections of shapes to add to the white board. See screenshot.
+ **Spotlight** displays a red pointer that you can move around the screen.
+ **Eraser** erases text and drawings.
+ **Format** a color pallet to change your font and drawing colors.
+ **Undo** undoes the last action.
+ **Redo** reverses the last Undo action.
+ **Clear** clears the whiteboard of *all* drawings and writing.
+ **Save** saves the whiteboard to a file in MaX UC. It can be viewed from the Meetings tab in MaX UC under View Recorded Meetings.

IPHONE / IPAD SCREEN SHARING OPTIONS

When you choose to share your iPhone Screen, you will be prompted with a set of instructions. Depending on which model iPhone you have, the process may vary slightly from the ones displayed. Follow the instruction for "mirroring" for your model iPhone.

Your PC and iPhone must be on the same Wi-Fi network.

When the steps are complete, everything you do on your iPhone will be shared on the Meeting screen.

| PC VIEW	iPHONE VIEW	MEETING VIEW

On your iPhone or iPad:

1. Connect to Wi-Fi network **Fire House 1**

2. Tap 🖵 **Screen Mirroring**

   How to find it: swipe down from the top right corner of the screen
   On iOS 11 or earlier, swipe up from the bottom of the screen

3. Choose **accessionmeeting-smaier**

   Don't see it? Restart your device
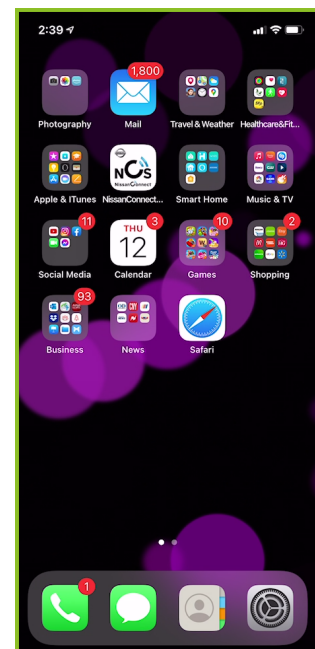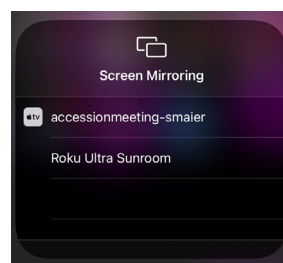
ADVANCED MEETING SETTINGS

To work with the Advanced Meeting settings, in MaX UC go to **Profile > Settings > Meetings.**
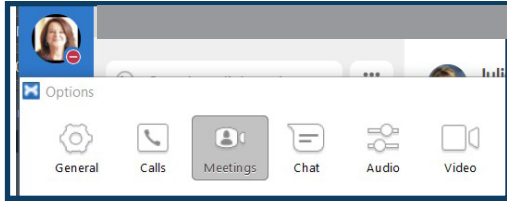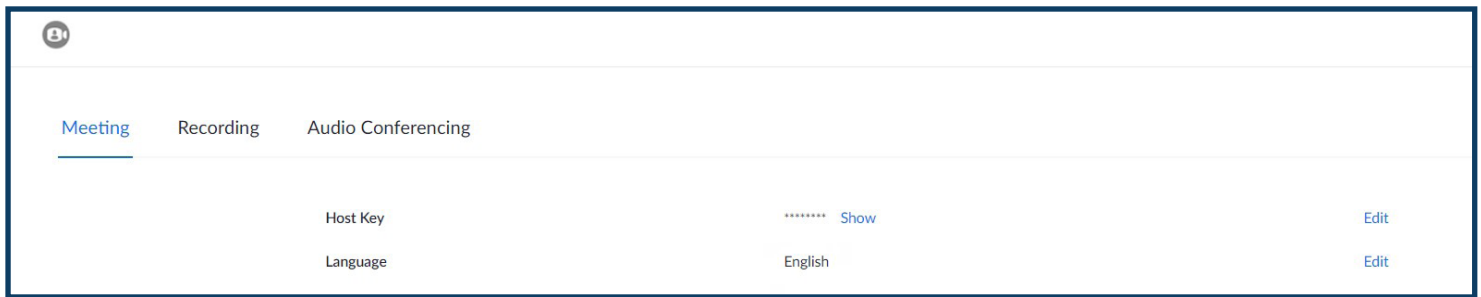

Scroll to the bottom of the Meetings tab and select **Advanced Settings.**

There are three tabs at the top for Meeting Settings, Recording Settings and Telephone Settings.

MEETINGS TAB

MEETING SECTION - PART I

Host Key	******** Show	Edit
Language	English	Edit

+ **Host Key** 6-digit pin used to claim host controls from a TUI (Telephone User Interface). Gives host abilities when dialed in from a
    telephone. To view the key, select **Show**. To edit the key, Select **Edit**.
+ **Language** displays the default language. To change the language, select **Edit**.
+ **Host Video** when selected, starts the meeting with the host video on. Default is off.
+ **Participants video** when selected starts the meeting with participants video on. Default is off. Participants can change this at any time after they join the meeting.
+ **Audio Type** determines how participants can join the audio portion of the meeting. Telephone and Computer Audio is

Security

Require that all meetings are secured with one security option

Require that all meetings are secured with one of the following security options: a passcode, Waiting Room, or "Only authenticated users can join meetings". If no security option is enabled, Meeting will secure all meetings with Waiting Room. ☑

Waiting Room

When participants join a meeting, place them in a waiting room and require the host to admit them individually. Enabling the waiting room automatically disables the setting for allowing participants to join before host.

Waiting Room Options

The options you select here apply to meetings hosted by users who turned 'Waiting Room' on

✓ Everyone will go in the waiting room

Edit Options   Customize Waiting Room

Require a passcode for Personal Meeting ID (PMI)

○ Only meetings with Join Before Host enabled

○ All meetings using PMI

Passcode   2238 ✏

Webinar Passcode

A passcode will be generated when scheduling a Webinar and participants require the passcode to join the Webinar.

Require passcode for participants joining by phone

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

Embed passcode in invite link for one-click join

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

+ **Require that all meetings are secured with one security option:** This is locked by the Administrator to off.
+ **Waiting Room:** When participants join a meeting, place them in a waiting room and require the host to admit them individually. Enabling the waiting room automatically disables the setting for allowing participants to join before host.
+ **Waiting Room Options:**
  + **Edit:** Set who should go in the waiting room: Everyone, Users not in your account, Users who are not in your account and not part of your whitelisted domains.
  + **If the host and co-hosts are not present or they lose connection during a meeting:** Choose to move participants to the waiting room if the host dropped unexpectedly
  + **Customize Waiting Room:** Customize what participants see when in the waiting room.
+ **Require a passcode for Personal Meeting ID (PMI):** This option is locked by the Administrator to On for meetings with Join before host enabled. You can edit the passcode.
+ **Webinar Passcode:** A passcode will be generated when scheduling a Webinar and participants require the passcode to join the Webinar. A Webinar license is required for hosts.
+ **Require passcode for participants joining by phone:** A numeric passcode will be required for participants joining by phone if your meeting has a passcode. For meeting with an alphanumeric passcode, a numeric version will be generated. This option is locked to on by the Administrator.
+ **Embed passcode in invite link for one-click join:** Meeting passcode will be encrypted and included in the invite link to allow participants to join with just one click without having to enter the passcode.

Schedule Meeting

Host video

Start meetings with host video on

Participants video

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

Audio Type

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

○ Telephone and Computer Audio

○ Telephone

○ Computer Audio

Allow participants to join before host

Allow participants to join the meeting before the host arrives

Enable Personal Meeting ID

A Personal Meeting ID (PMI) is a 9 to 11 digit number that is assigned to your account. ☑

Mute all participants when they join a meeting

Automatically mute all participants when they join the meeting. The host controls whether participants can unmute themselves. ☑

+ **Host video:** Choose to start meetings with host video on
+ **Participants video:** Choose to start meetings with participant video on. Participants can change this during the meeting.
+ **Audio Type:** Determine how participants can join the audio portion of the meeting.
  + Telephone and Computer Audio
  + Telephone
  + Computer Audio
+ **Allow participants to join before host:** Allow participants to join the meeting before the host arrives.
+ **Enable Personal Meeting ID:** A Personal Meeting ID (PMI) is a 9 to 11 digit number that is assigned to your account.
+ **Mute all participants when they join a meeting:** Automatically mute all participants when they join the meeting. The host controls whether participants can unmute themselves.

IN MEETING SECTION (BASIC) PART I

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

+ **Chat** when enabled, allows all meeting participants to send a message that is visible to all other participants.
+ **Private Chat** when enabled, allows meeting participants to send a private 1:1 message to another participant.
+ **Auto saving chats** will automatically save all in-meeting chats so that the host does not need to manually save the text of the chat after the meeting starts.
+ **Play sound when participants join or leave** plays a sound upon entrance or exit to meeting.
  Choose whether the sound is heard by the host and all participants or the host only.
  Choose if participants should record their name to be played when they join.

IN MEETING SECTION (BASIC) PART II

+ **Co-host:** allows the host to assign co-hosts to the meeting. The co-host has all of the same tools as the host.
+ **Meeting Polls/Quizzes:** add polls or quizzes either before or during the meeting with questions to be answered by participants. See Polling.
+ **Webinar Polls/Quizzes:** add polls or quizzes either before or during the webinar with questions to be answered by participants. Refer to the MaX Webinar User Manual for more information.

IN MEETING SECTION (BASIC) PART III

Screen sharing

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

Who can share?

○ Host Only ● All Participants ⑦

Who can start sharing when someone else is sharing?

● Host Only ○ All Participants ⑦

Disable desktop screen sharing for meetings you host

When this option is on, users can only share selected applications and files. ☑

Disable screen sharing when guests are in the meeting

Guests include users who are not signed in or not in the same account. Participants who dial-in via phone or join with SIP/H.323 devices will still be able to screen share. ☑

Annotation

Allow host and participants to use annotation tools to add information to shared screens ☑

☑ Allow saving of shared screens with annotations ☑

☐ Only the user who is sharing can annotate ☑

Remote control

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

☑ Allow remote controlling user to share clipboard ☑

+ **Who can share:** Set who has the ability to share, Host only or all participants.
+ **Who can start sharing when someone else is sharing:** Set who can start sharing when someone else is sharing, Host only or all participants.
+ **Disable desktop screen sharing for meetings you host:** When this option is on, users can only share selected applications and files.
+ **Disable screen sharing when guests are in the meeting:** Guests include users who are not signed in or not in the same account. Participants who dial-in via phone or join with SIP/H.323 devices will still be able to screen share.
+ **Annotation:** Allow participants to use annotation tools to add information to shared screens.
+ **Remote control:** During screen sharing, the person who is sharing can allow others to control the shared content.

IN MEETING SECTION (BASIC) PART IV

Non-verbal feedback

Allow meeting participants to communicate without interrupting by clicking on icons (yes, no, slow down, speed up, coffee cup). These icons are found in the Reactions menu in the toolbar, and when selected, they display on the participant's video and in the participants list until dismissed. ☑

Meeting reactions

Allow meeting participants to communicate without interrupting by reaction with emojis (e.g. clap, heart, laugh). These emojis are found in the Reactions menu in the toolbar, and when selected, they display on the participant's video and in the participants list for 10 seconds. Participants can change their emoji skin tone in Settings. ☑

🔘 All emojis ☑

⚪ Selected emojis 👏 👍 😄 😮 ❤️ 🎉

Allow removed participants to rejoin

Allow previously removed meeting participants and webinar panelists to rejoin ☑

Allow participants to rename themselves

Allow meeting participants and webinar panelists to rename themselves. ☑

Hide participant profile pictures in a meeting

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

+ **Nonverbal feedback:** Participants in a meeting can provide nonverbal feedback and express opinions by clicking on icons in the Participants panel.
+ **Meeting Reactions:** Allow participants to nonverbally react with emojis. these emojis are found in the "Reactions" menu in the toolbar, and when selected, display on the participant's video as well as in the participants list for 10 seconds. Participants can change their emoji's skin tone in Settings.
+ **Allow removed participants to rejoin:** Allows previously removed meeting participants and webinar panelists to rejoin.
+ **Allow participants to rename themselves:** Allow meeting participants to rename themselves in the participant window.
+ **Hide participant profile pictures in a meeting:** All participant profile pictures will be hidden and only the names of the participants will be displayed on the video screen. Participants will not be able to update their profile pictures in the meeting.

Q&A in webinar

Allow attendees to ask questions for the host and panelists to answer

Breakout room

Allow host to split meeting participants into separate, smaller rooms

Remote support

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

Closed captioning

Allow host to type closed captions or assign a participant/3rd-party service to add closed captions

Save Captions

Allow participants to save fully closed captions or transcripts

Virtual background

Customize your background to keep your environment private from others in a meeting. This can be used with or without a green screen.

☑ Allow use of videos as virtual backgrounds ⓘ

View 7 virtual background(s) ⓘ

Video filters

Turn this option on to allow users to apply filters to their videos ☒

Show a "Join from your browser" link

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

+ **Q&A in webinar:** Allows attendees to ask questions for the host and panelists during a webinar. A report can be pulled at a later time. Only available with MaX Webinar.
+ **Breakout room:** allows meeting participants to be split out into separate, smaller rooms. See Breakout Rooms.
+ **Remote support:** allows meeting host to provide 1:1 support to another meeting participant.
+ **Closed captioning:** allows the host, assigned participant or third party device to type closed captions.
+ **Save Captions:** allows participants to save fully closed captions or transcripts when used.
+ **Virtual Background:** Allows users to replace the meeting background with any image. Choose or upload an image in the Meeting Desktop application settings. See Virtual Backgrounds.
+ **Video Filters:** Allows users to apply filters to their video including frames and accessories.
+ **Show a "join from your browser" link:** allow participants to bypass the meeting application download process, and join a meeting directly from their browser.

Other

Call a SIP/H.323 room system directly from the client

Direct call to a room system from client. This adds a 'Call Room' button to the client home page.

Personal Meeting ID

116-7440-3734 ✏

https://buvideo.accessionmeeting.com/j/11674403734?pwd=dEpucVZpQytuRDlMUEYyVHFINm16Zz09

Personal Link

https://buvideo.accessionmeeting.com/my/nrdsmm?pwd=dEpucVZpQytuRDlMUEYyVHFINm16Zz09 ✏

Personal Link is an alias of your personal meeting URL https://buvideo.accessionmeeting.com/j/11674403734?pwd=dEpucVZpQytuRDlMUEYyVHFINm16Zz09.
It must be 5 to 40 characters.
It must start with a letter and can contain only letters (a-z), numbers (0-9) and periods (".").

+ **Call a SIP/H.323 room system directly from the client:** Enables direct calling to a room system from the MaX Meeting client. It will add a "Call Room" button to the client.
+ **Personal Meeting ID:** The personal meeting ID and link you can provide to attendees rather than a system generated one.
+ **Personal Link:** is an alias for your personal meeting URL.

RECORDING TAB

Meeting   Recording   Audio Conferencing

Recording

Local recording

Allow hosts and participants to record the meeting to a local file

☑ Hosts can give meeting participants permission to record locally

Automatic recording

Record meetings automatically as they start

Recording notifications - Phone users

By default, phone users will hear one audio notification indicating that a recording has started.

☐ Require phone-only users to press 1 to consent to being recorded ⓘ
☐ Multiple notifications for phone users ⓘ

+ **Local Recording:** allows hosts and participants to record the meeting. Select if host needs to give permission to record.
+ **Automatic recording:** Choose to have meetings recorded automatically. You will need to toggle this on and off if you do not want all meetings recorded automatically.
+ **Recording notifications - Phone users:** By default, phone users will hear one audio notification that a recording has started.
  + Select to require phone users to acknowledge they are being recorded by pressing 1.
  + Select to have the notification repeat multiple times.

AUDIO CONFERENCING TAB

The settings in the Audio Conferencing Tab are for those participants that will be joining a MaX Meeting via audio only from a telephone.
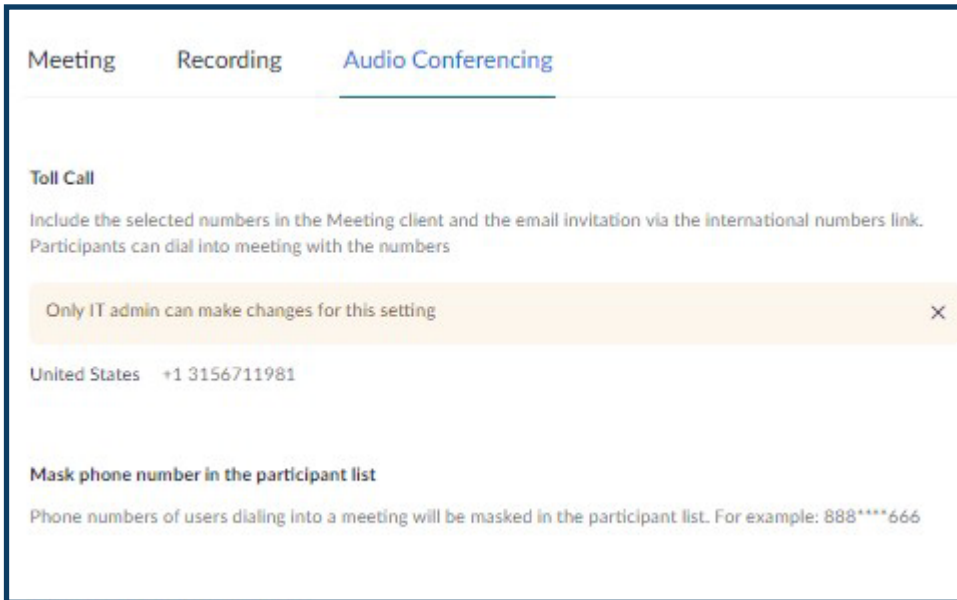

+ **Toll Call:** Includes the International Numbers link. This can only be changed by the System Administrator.
+ **Mask phone number in the participant list:** Phone numbers of participants dialing in will be masked so other participants can't view them.
+ **Global Dial-in Countries/Regions:** Choose the countries/regions that frequently have participants who need to dial in to meetings.

POLLING

Once polling has been selected in Advanced settings, **'Polls'** is added to the meeting controls. This allows the host to survey the attendees. A poll can be added during a meeting or the host can log into the meeting ahead of time and create the poll.
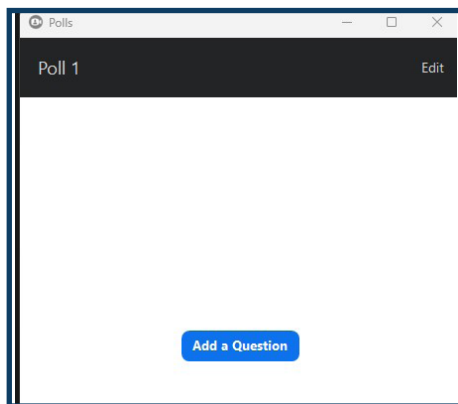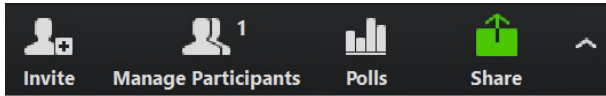
+ Select **Polls** from the taskbar at the bottom of the Meeting window.
+ Select **Add a Question.** You will be redirected to the Meeting Settings.
+ Scroll to and select **Create Poll**.
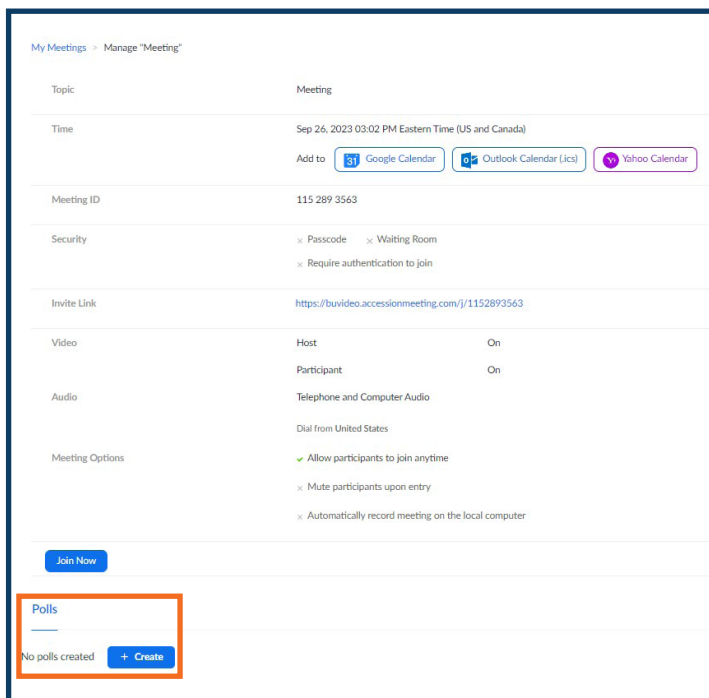
+ Scroll to and select **Create Poll**.
  The Poll Question screen is launched.

Untitled Poll

Untitled Question   ● Single Choice ⌄

○ Choice 1

○ Choice 2

+ Add choice

                                    🗑 ⎙

+ Add Question

☐ Allow participants to answer questions anonymously

··· Save Cancel

+ Double click on **Untitled Poll** to give the Poll a name.
+ Enter the first question in the Untitled Question box and select **Single Choice** if only one answer is applicable or **Multiple Choice** if participants can select more than one answer.
+ Double Click on **Choice 1**, **Choice 2**, etc. to enter the answers.
+ Select **Add Choice** to add additonal choices.
+ Select **Add Question** to add additonal questions to your poll.
+ Select the **three dots** to display the option to allow participants to answer anonymously.
+ When you are done, click **Save**. Your poll is displayed.

🅖 Polls   — □ ✕

Polling 1: Stacey's Poll   Edit

1. Was the information in this document helpful?

○ Yes

○ No

+ If the poll is not automatically displayed, select **Polls** in the taskbar.
+ Select **Launch Polling** to send the poll to participants.

Launch Polling

What Participants See
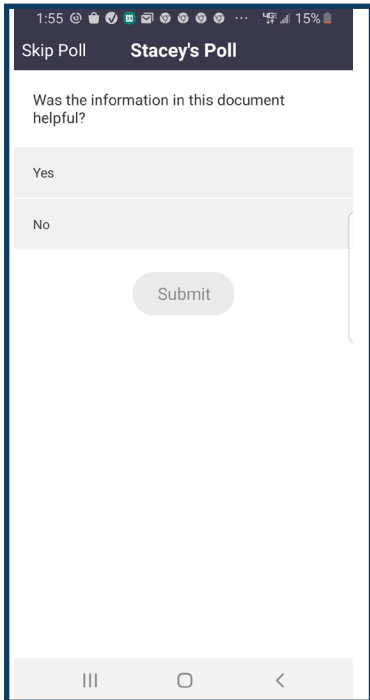
+ Participants receive the poll. They can choose to complete it and hit submit or skip it.
If they skip it, they can complete it at any time while the meeting is active.

What the Host Sees
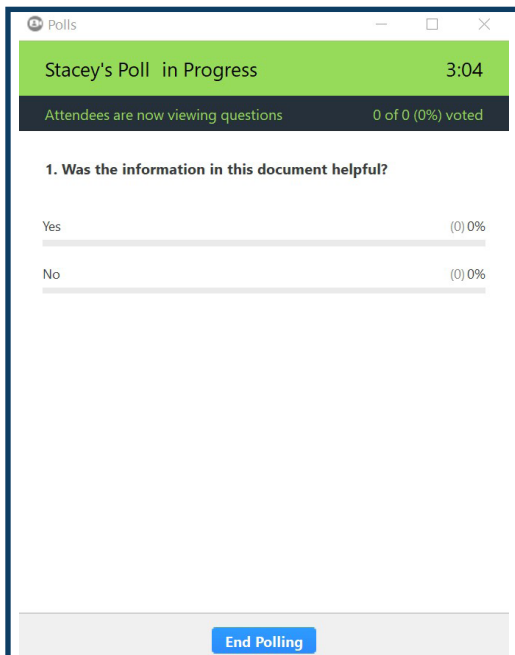
+ As participants complete the poll, the host can see the percentage for each answer.

+ Once you end the polling, you have to option of sharing the results with the attendees or relaunching the poll.

NON-VERBAL FEEDBACK AND REACTIONS

For lengthy or large meetings, non-verbal feedback and reactions are excellent communication tools. They use symbols and emojis to provide feedback to the host and other participants.

NON-VERBAL FEEDBACK
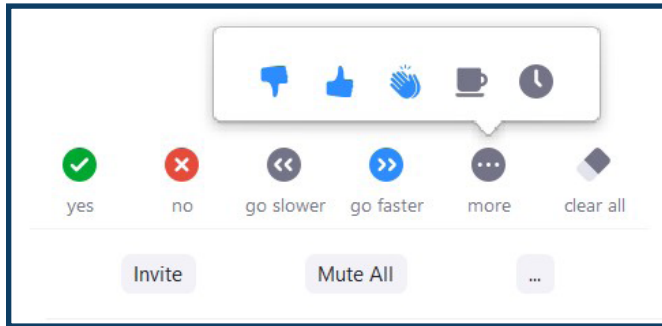
+ Select **Participants** or **Manage Participants** from the **Meeting taskbar** at the bottom.
+ Select **More** to view additional feedback buttons
  These are also useful for a cohost to help the host stay on track. The feedback icons appear next to the participant's name in the Participant Window.
+ Select **Clear** to clear the non-verbal feedback.

REACTIONS
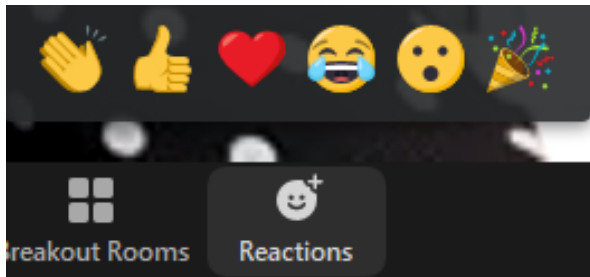
+ Select **Reactions** in the **taskbar** at the bottom.
+ Reactions appear in the participants video window and disappear after 10 seconds.

VIRTUAL BACKGROUND AND VIDEO FILTERS

Virtual Background allows participants to replace their background with any selected image. Choose or upload an image in the Meeting Desktop application settings.
Video Filters put frames and animations in the meeting window.
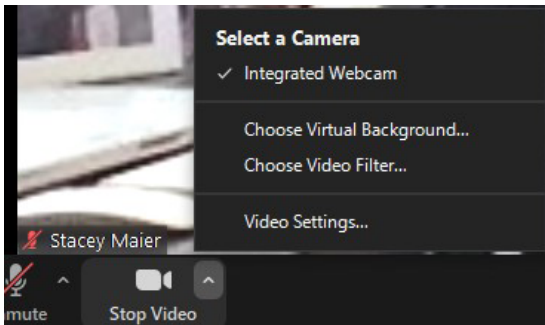
+ In the video window taskbar, select the arrow next to the video camera.
+ Select Choose Virtual Background.
+ The Virtual Background window is displayed.
+ Select Choose Video filter.
+ The Video Filter window is displayed.
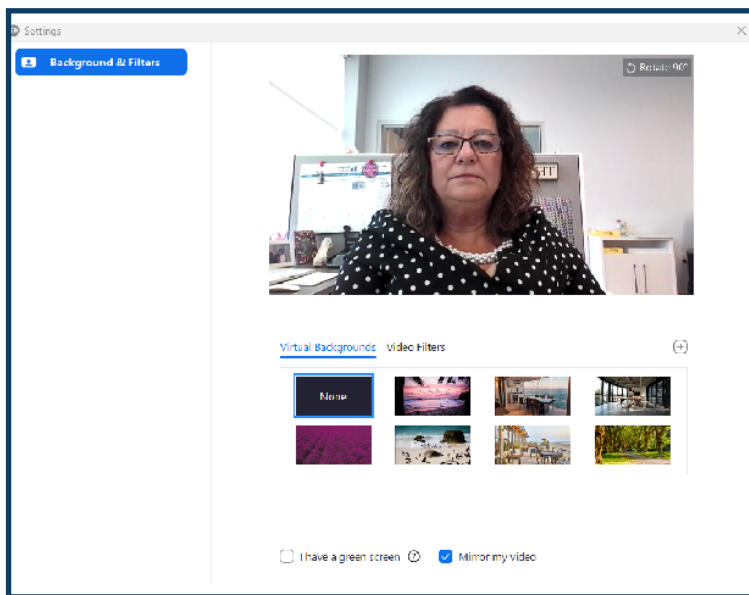
VIRTUAL BACKGROUND WINDOW

+ Choose your background from the ones you have already downloaded.
+ Click the + to add new backgrounds from your photo library or files.
+ Select **I have a green screen** for a better quality virtual background.
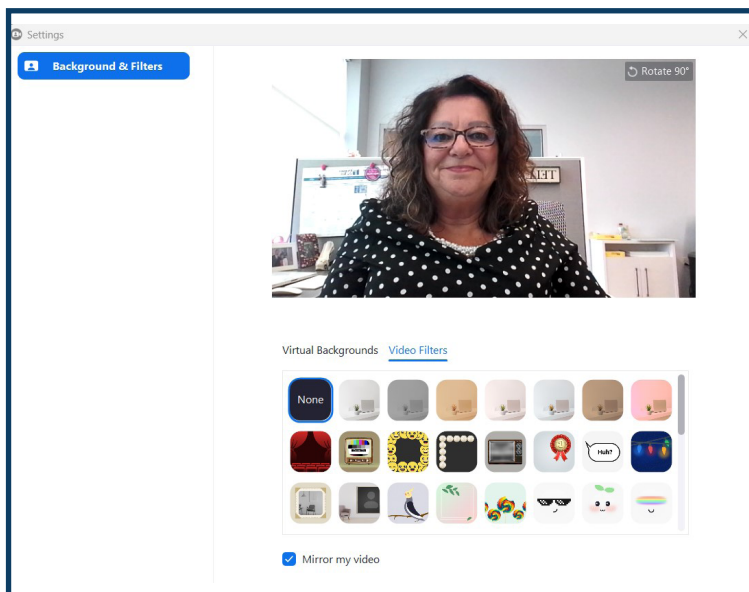
VIDEO FILTER WINDOW

+ Choose your video filter from the ones you have already downloaded.
+ Select **I have a green screen** for a better quality virtual background.

Need support? Connect with us at www.northland.net/support or
Dial 4357 (HELP) or 315-671-6262 to speak to a Northland Representative

BREAKOUT ROOMS

Breakout rooms allow the host or co-host to split participants into smaller meeting rooms. This is useful when conducting group exercises or role plays.
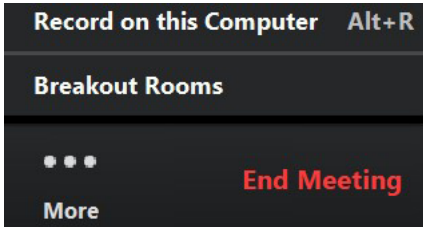
+ On the Meetings task bar at the bottom, select **Breakout Rooms**. Depending on how many advanced tools you are using, you may need to click on **More** to view.
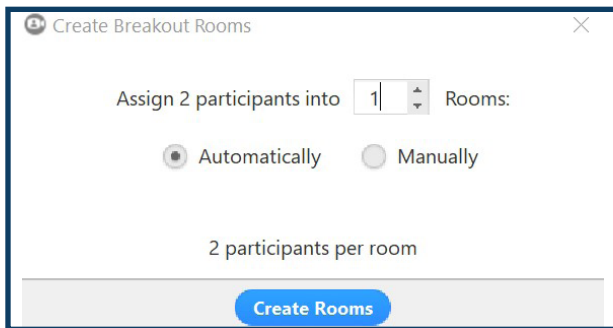
+ Set up the number of breakout rooms you need and if participants will be placed in rooms automatically or manually. You will be able to move participants between rooms.

+ Select **Create Rooms**.

NOTE: Participants receive an invitation and must accept to join the room.
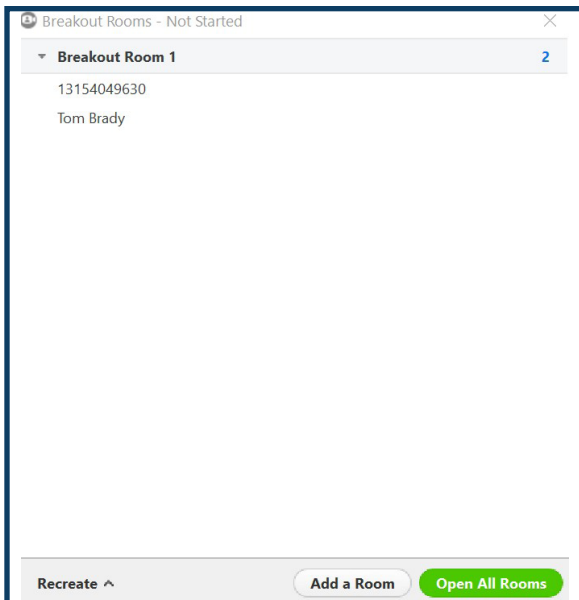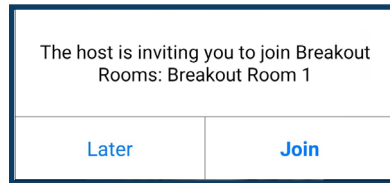
+ The room management tool is displayed. Here you can see which participants are assigned to which rooms.

+ When you are ready select **Open All Rooms**.
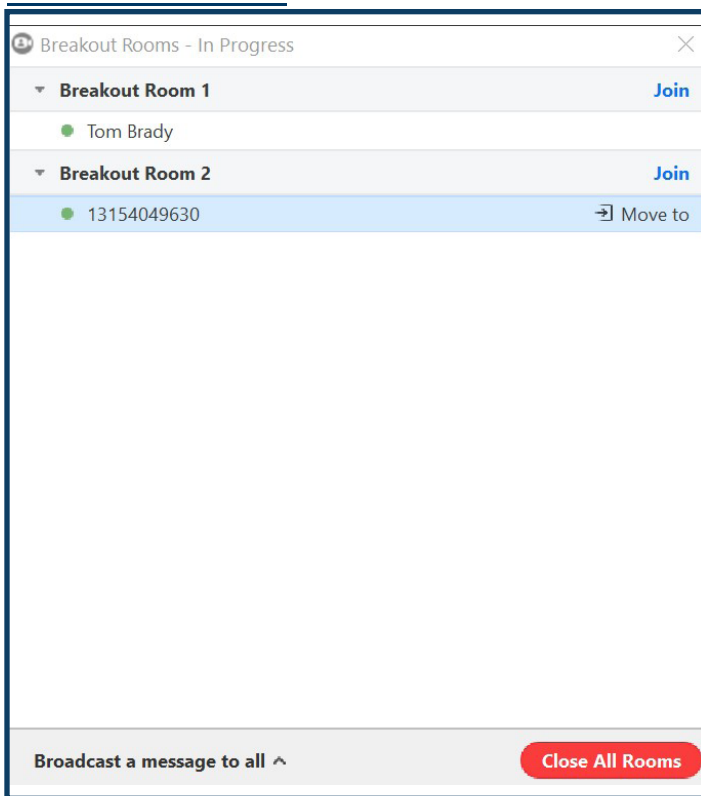
+ Once the rooms are open, the host can join any of the rooms and move between rooms.
+ Select a participant to move them from room to room or back to the main room.
+ Send a broadcast message to all rooms by selecting **Broadcast a message to all.**
+ Select **Close All Rooms** to close the rooms and bring all participants back to the main room. You can open and close rooms throughout the duration of the meeting.
NOTE: When you close the rooms, participants will receive a notification and have 60 seconds to chose to leave or the room is automatically closed.
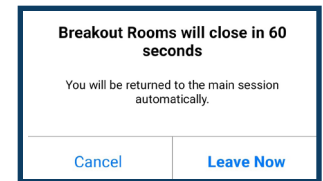
LEAVE A BREAKOUT ROOM
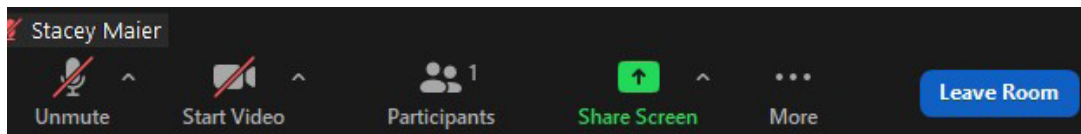
+ In the Meeting taskbar, select **Leave Room**.
+ Hosts will be asked to confirm one of the following: **End Meeting for All**
                                                          Leave Meeting
                                                          Leave Breakout Room
+ Participants will be asked to confirm: **Leave Meeting**
                                          Leave Breakout Room

WAITING ROOM

The waiting room places participants in a "holding area" until the host or co-host enters them into the meeting.

The host and co-host will receive notification that a participant has been placed in the waiting room and can allow them entrance into the meeting. The waiting room can also be viewed to see other participants that may already be waiting.

The participants receive a message that they have been placed in the waiting room and the host will be with them shortly.

You turn on the Waiting Room, customize the message and add a logo in the **Advanced Meeting Settings** of MaX UC.
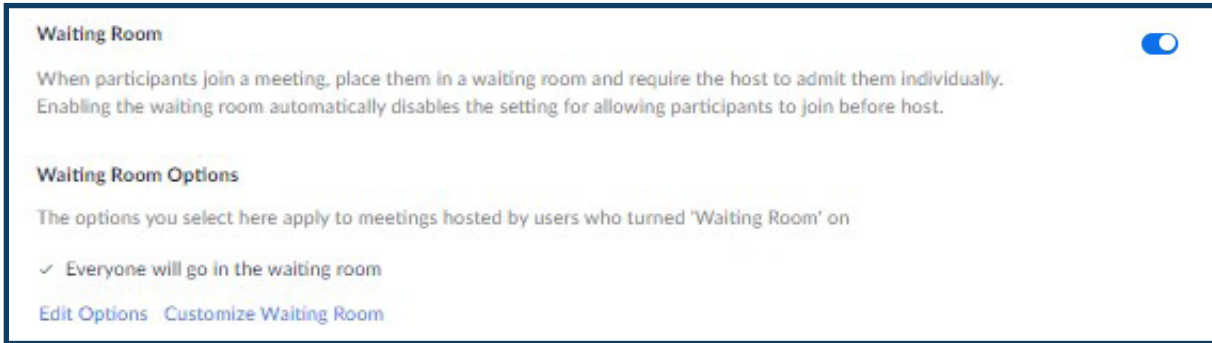
+ Go to **Profile > Settings > Meeting > Advanced Settings > Waiting Room**
+ Use the toggle switch to turn the waiting room on/off.
+ Select **Edit Options** to choose who will go into the waiting room.
+ Select **Customize Waiting Room** to set a custom message, add a logo and include the meeting topic.
+ You can also turn on the waiting room in the Security section of the schedule meeting screen.
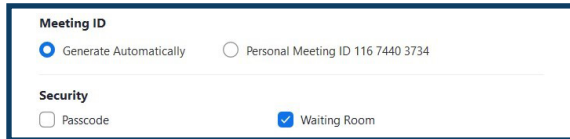
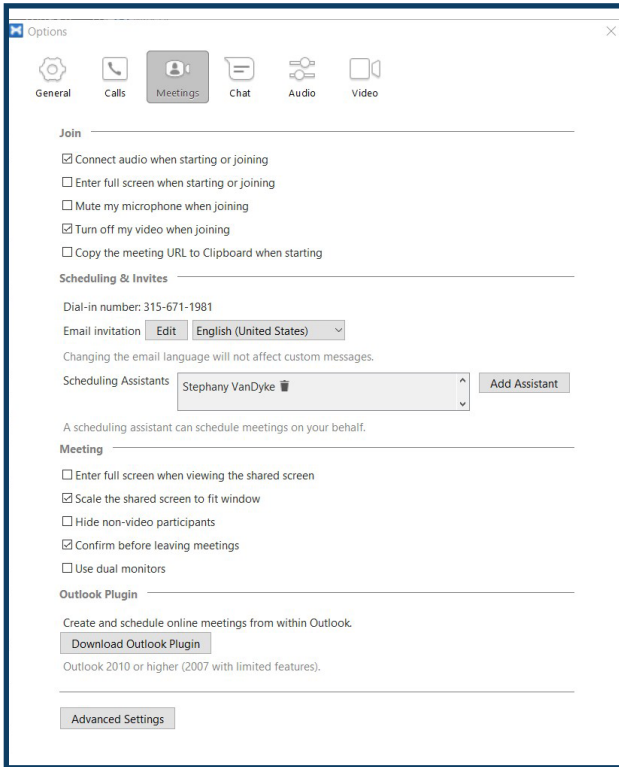
What Participants See
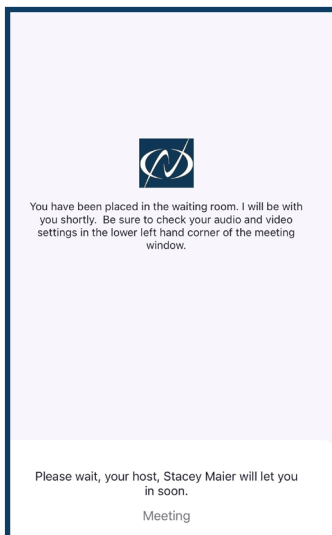
What the Host Sees
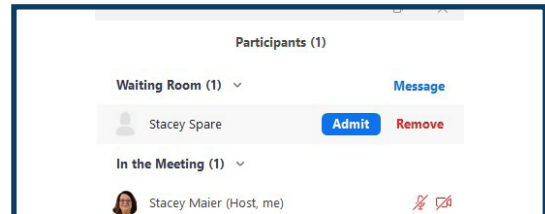
+ Hover over the participant name to admit or remove them.

WORKING WITH SCHEDULING ASSISTANT

GIVE OTHERS PERMISSION TO SCHEDULE FOR YOU

+ In MaX UC go to **Profile > Settings > Meetings**.
+ Scroll to Scheduling Assistant and select **Add Assistant.** Your contact list will appear.
+ Begin typing to find the person you would like to give permission to, single click their name to select them and click **OK.**
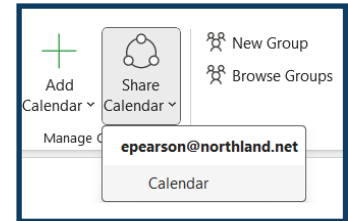+ Repeat for each person that you would like to give permission to.

NOTE: The Assistants must restart MaX UC to see the options to schedule.

You will also need to go to your Outlook calendar permissions to add the Assistants. (See below).

+ In the Outlook Toolbar, select your calendar.
+ In the **Manage Calendars** section, select **Share Calendar**.
+ Select **Add**. Your Outlook directory is displayed.
+ Choose the assistant from the directory.
+ Under **Permissions** at the bottom, select **Can Edit**.
+ Select **OK**. This grants your scheduling Assistant access to edit your calendar.

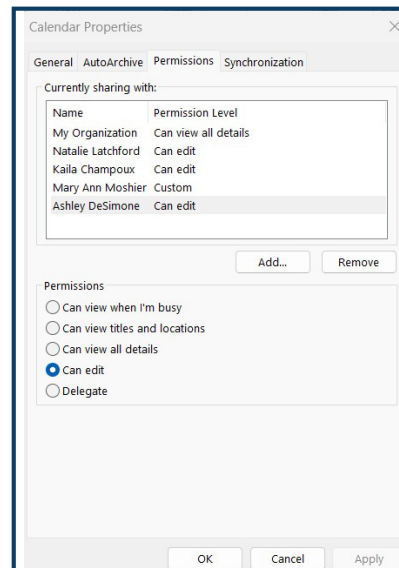NOTE: The Assistants must restart Outlook to see the options to schedule.

Share Calendar

Choose Assistant from Directory
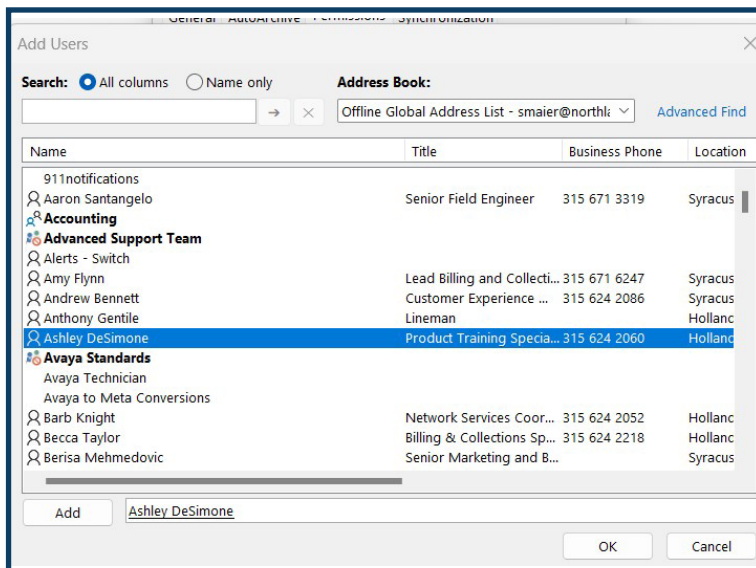
Grant Permissions

WORKING WITH SCHEDULING ASSISTANT

SCHEDULE A MAX MEETING ON BEHALF OF SOMEONE ELSE

+ In MaX UC, open the **Meetings** menu and select **Schedule a Meeting**. The window to the left opens.
+ Change the title of the meeting, start time, and duration.
+ Select In the Video (when joining a meeting) option.
+ Select the **Audio Options. Telephone and Computer Audio** is the recommended setting.
+ Set **Calendar** to **Other Calendars**.
+ Select **Advanced Options**.
+ The **Schedule For** option, which by default is unselected and greyed out, should now have a name populated in it. Check this box to enable the option, then use the drop down menu to select the person that you wish to schedule for.
NOTE: If the person's name isn't present, They must follow the directions on page 29. If they have followed the instructions, restart MaX UC.
+ Once you are done populating all of the required fields, click **Schedule** at the bottom of the window. This will bring up a window containing all of the information you need to put into the meeting in Outlook. Click "Copy to Clipboard"

The Meeting Detail window opens.
+ Select **Copy to Clipboard**.
+ Go to the calendar of the person you are scheduling for and right click on it.
+ Select either **New Meeting Request** or **New Recurring Meeting.**
+ The invite will open.
+ Paste the meeting information from the clipboard and complete the invitation with subject and email addresses.

WEB BROWSER COMPATIBILITY (JOIN ONLY)

Available Features across web browsers when participants do not download the MaX UC client.

Function	Chrome	Firefox	Safari	Edge	Internet Explorer
Share Video	X	X	X	X	
Share Screen	X	X		X	
Join Computer Audio	X				
Join Audio by Phone	X	X	X	X	X
Meeting Host Controls	X	X	X	X	X
View Shared Video	X	X	X	X	
View Shared Screen	X	X	X	X	X
Request Remote Control	X	X	X	X	X
In-meeting Chat	X	X	X	X	X
Closed Captioning	X	X	X	X	X
Webinar Q & A	X	X	X	X	X

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Dial 4357 (HELP) or 315-671-6262 to speak to a Northland Representative