



MaX Meeting

Video Conference

USER MANUAL



JUNE 2022

TABLE OF CONTENTS

CLICK ON ANY PAGE NUMBER TO RETURN TO THE TABLE OF CONTENTS

WHAT IS MAX MEETING?	1
MEETING MENU + MEETING ROOM PROPERTIES	
MAX MEETING SETTINGS	2
OPTIONS + SETTINGS, OUTLOOK PLUG-IN	
CREATE MEETING INVITES	3
PC, MOBILE + OUTLOOK INVITES	
START AN INSTANT MEETING	5
SCHEDULE A FUTURE MEETING	6
ADVANCED MEETING OPTIONS	7
REQUIRE PASSWORD, PERSONAL MEETING ID, RECORD MEETING	
JOIN A SCHEDULED MEETING	8
JOIN FROM LINK, PHONE OR ROOM SYSTEM	
PARTICIPANT MEETING WINDOW	9
PARTICIPANT TOOLS	
HOST A MEETING	11
HOST TOOLS	
HOST MEETING WINDOW	12
ADVANCED MEETING SETTINGS	17
SET POLLING, NON-VERBAL FEEDBACK, BREAKOUT ROOMS + WAITING ROOM	
POLLING	23
NON-VERBAL FEEDBACK	25
VIRTUAL BACKGROUND	25
BREAKOUT ROOMS	26
WAITING ROOM	28
WORK WITH SCHEDULING ASSISTANT	29
WEB BROWSER COMPATABILITY (JOIN ONLY)	31

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 [page 29](#) 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.

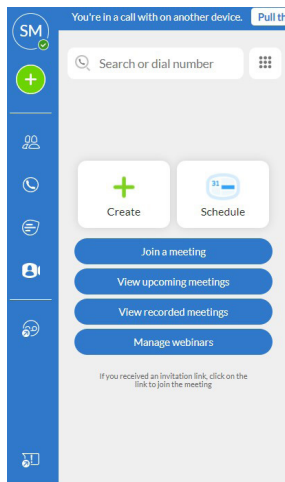
Once a meeting has started, all participants can:

- + 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.

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.

Need support? Connect with us at www.northland.net/support or

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

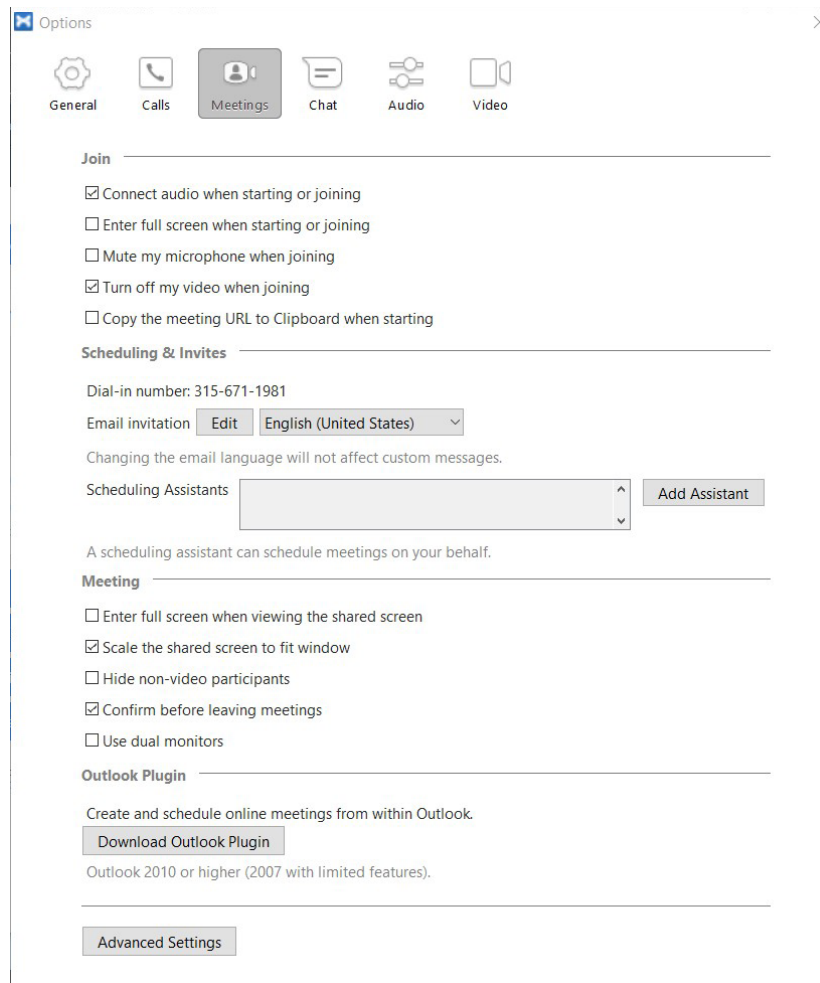
MaX MEETING SETTINGS

2

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**



The screenshot shows the 'Options' dialog box with the 'Meetings' tab selected. The 'Join' section includes checkboxes for 'Connect audio when starting or joining' (checked), 'Enter full screen when starting or joining' (unchecked), 'Mute my microphone when joining' (unchecked), 'Turn off my video when joining' (checked), and 'Copy the meeting URL to Clipboard when starting' (unchecked). The 'Scheduling & Invites' section shows a dial-in number of 315-671-1981, an email invitation button, a language dropdown set to 'English (United States)', and a note that changing the email language will not affect custom messages. Below this is a 'Scheduling Assistants' list with an 'Add Assistant' button. The 'Meeting' section includes checkboxes for 'Enter full screen when viewing the shared screen' (unchecked), 'Scale the shared screen to fit window' (checked), 'Hide non-video participants' (unchecked), 'Confirm before leaving meetings' (checked), and 'Use dual monitors' (unchecked). The 'Outlook Plugin' section has a 'Download Outlook Plugin' button and a note that it works for Outlook 2010 or higher. An 'Advanced Settings' button is at the bottom.

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 [page 17](#) for more information on advanced settings.

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CREATE MEETING INVITES

3

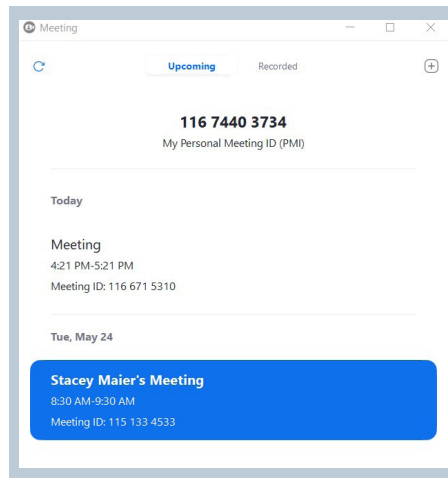
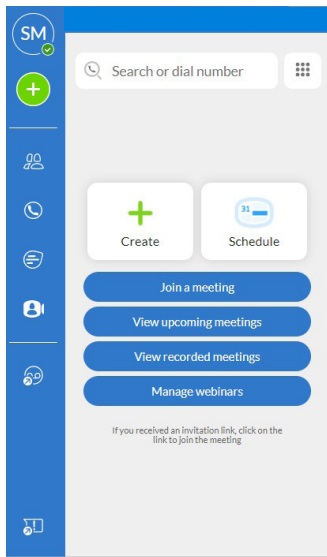
GET STARTED

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

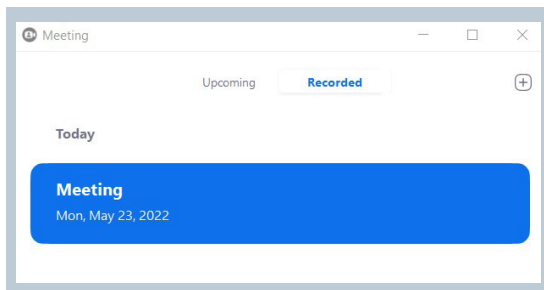
From the **MEETINGS** tab, select **VIEW UPCOMING MEETINGS**. A list of all the meetings you have created is displayed.



+ 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.

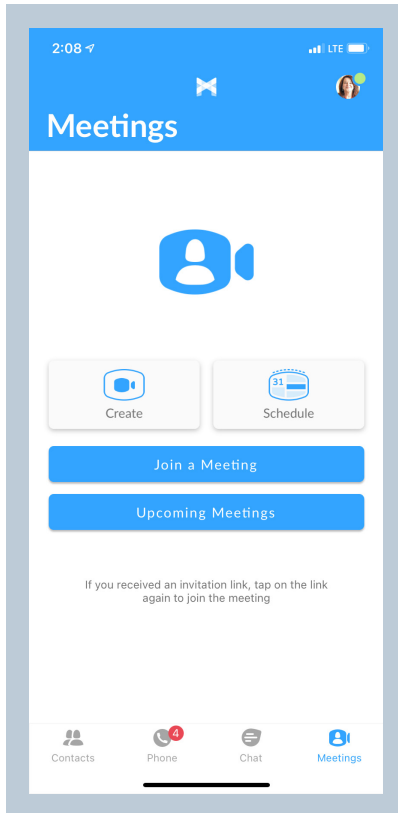
+ Click the plus sign to schedule a new meeting.

iPHONE AND ANDROID APP

4

The **Meetings** tab on iPhone and Android devices and tablets provide most of the same options as the desktop application.

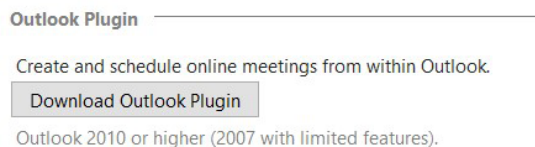
NOTE: There is not an option to record or view recorded meetings on the mobile app.



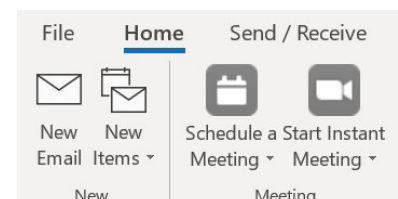
OUTLOOK PLUG IN

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.

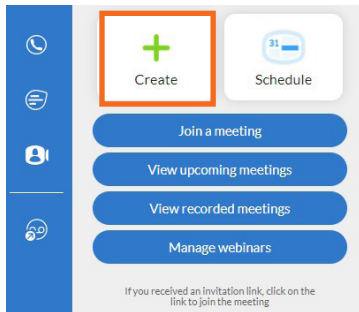


START AN INSTANT MEETING

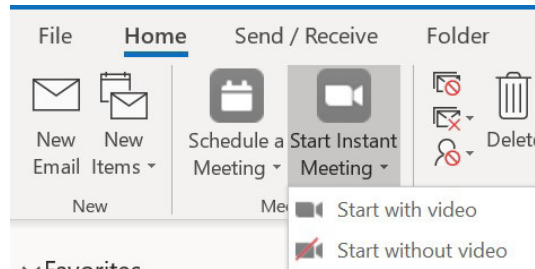
From the desktop app, mobile app or Outlook Plug-in go to the **Meetings** tab and click **Start Meeting** or **Create Meeting**.

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

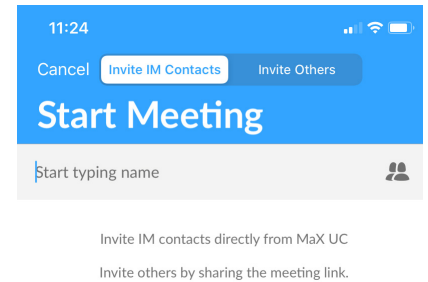
Desktop App



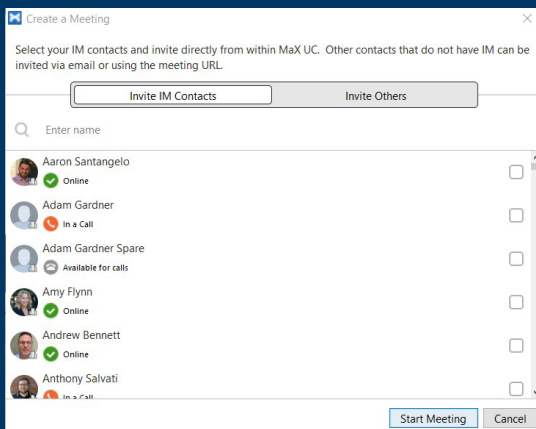
Outlook Plug in



Mobile App

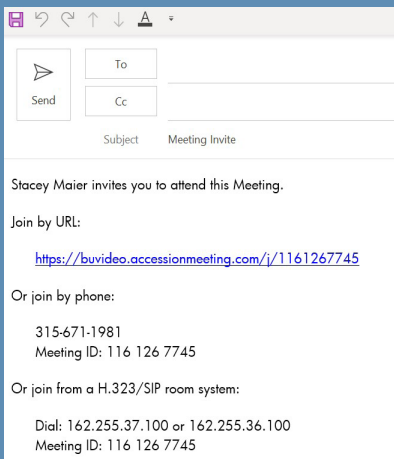
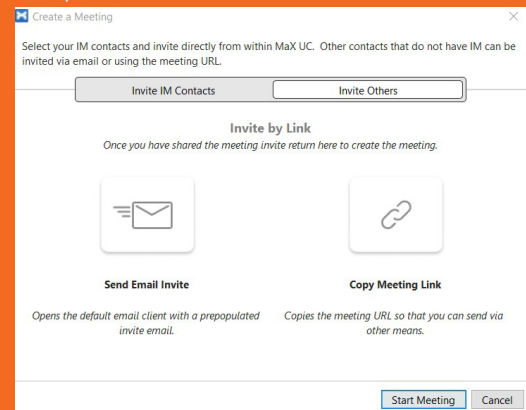


Select participants from your IM contacts and select **Start Meeting**.



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.



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.

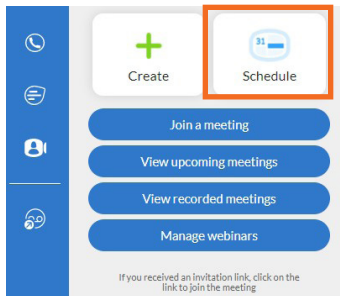
SCHEDULE A FUTURE MEETING

6

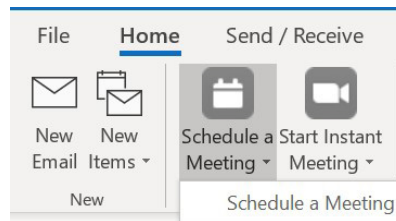
From the desktop app, mobile app or Outlook Plug-in go to the **Meetings** tab and click **Schedule Meeting**.

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

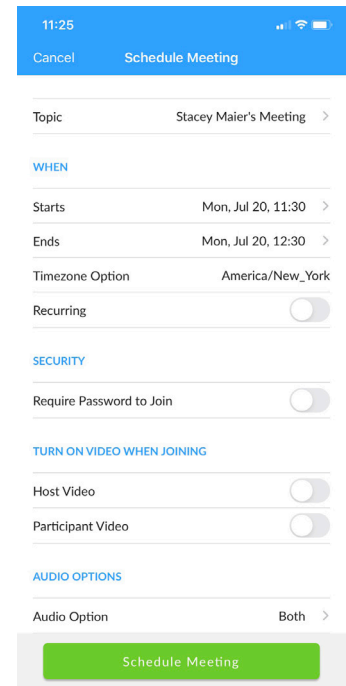
Desktop App



Outlook Plug in



Mobile App

A screenshot of the 'Schedule Meeting' dialog box in the Desktop App. The dialog has a title bar 'Schedule meeting' and a close button. The main content is titled 'Schedule Meeting'. It includes a 'Topic' field with 'Stacey Maier's Meeting'. Below this are 'Start' (Wed November 11, 2020, 03:00 PM) and 'Duration' (1 hour, 0 minute) fields. There is a checkbox for 'Recurring meeting' and a 'Time Zone' dropdown set to 'Eastern Time (US and Canad...)'. The 'Meeting ID' section has two options: 'Generate Automatically' (selected) and 'Personal Meeting ID 116-7440-3734'. The 'Password' section has a checkbox for 'Require meeting password'. The 'Video' section has 'Host' and 'Participants' options, both set to 'Off'. The 'Audio' section has three options: 'Telephone', 'Computer Audio', and 'Telephone and Computer Audio' (selected). There is a 'Dial in from United States' link. The 'Calendar' section has three options: 'Outlook' (selected), 'Google Calendar', and 'Other Calendars'. At the bottom, there is an 'Advanced Options' dropdown and two buttons: 'Schedule' and 'Cancel'.

- + 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.
- + 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 [page 7](#) for Advanced Meeting Options.

ADVANCED MEETING OPTIONS



Select the dropdown next to ADVANCED OPTIONS to view them.

- + **Enable Waiting Room:** Select to place participants in a waiting room until you let them into the meeting.
- + **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. * *

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 **Schedule**, the meeting invite opens from Outlook so that you can address it to both required and optional participants.

- + 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


8

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

Stacey Maier's Meeting

 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 ☐ X No

- + 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**.

Stacey Maier is inviting you to a scheduled meeting

Join Meeting
<https://buvideo.accessionmeeting.com/j/1157733486>

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)

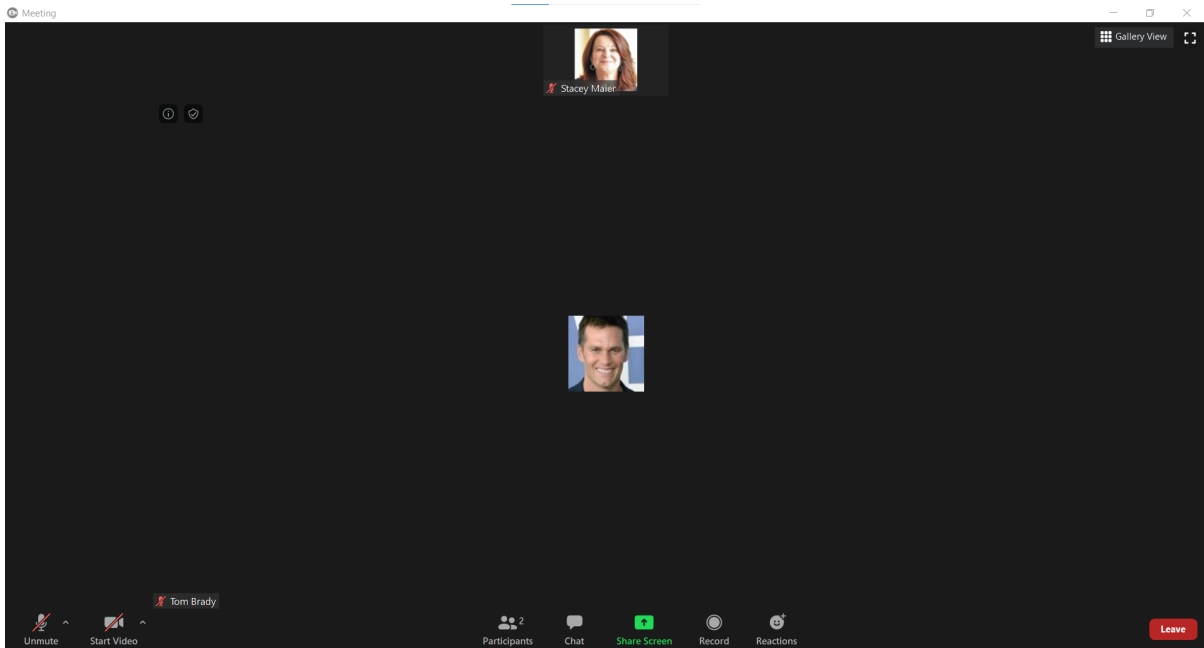
Join by H.323
162.255.36.100 (NY)
162.255.37.100 (CA)
Meeting ID: 115 773 3486

 Reply  Forward

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.

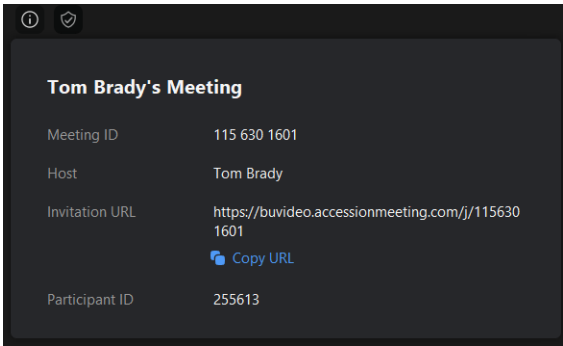


UPPER LEFT

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)

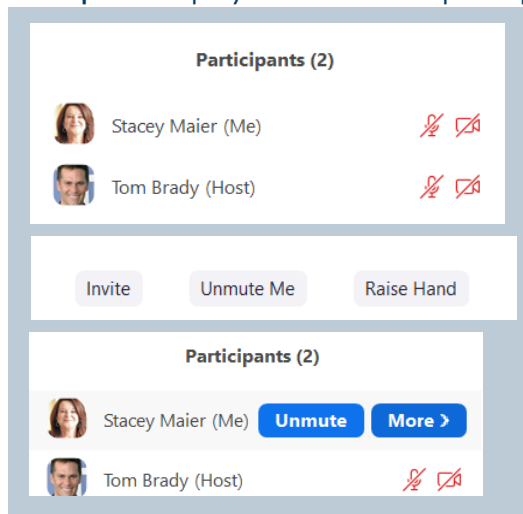
Mute to mute/unmute the microphone. Click the arrow to select and/or test your speaker and microphone and view additional audio settings. **Stop/Start Video** to toggle the video on or off. Click the arrow to select your camera, use a virtual background and view additional video settings.

PARTICIPANT VIEW

10

BOTTOM TASK BAR

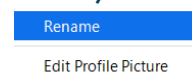
Participants displays the number of participants. Click on it to view additional participant tools.



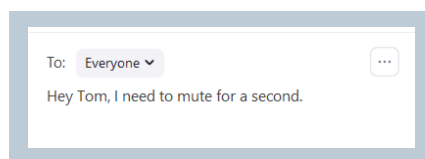
In the top portion of the participant window, you can view the other participants, **Mute/Unmute** yourself and toggle your video **On/Off**. You cannot **Mute/Unmute** other participants or toggle others video **On/Off**.

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.



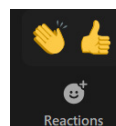
Chat opens the chat window. You can chat with the host, or the host and other participants when allowed by the host.



- + 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.

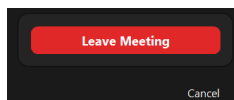
Share Screen opens the screen share options. See [page 14](#).

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.



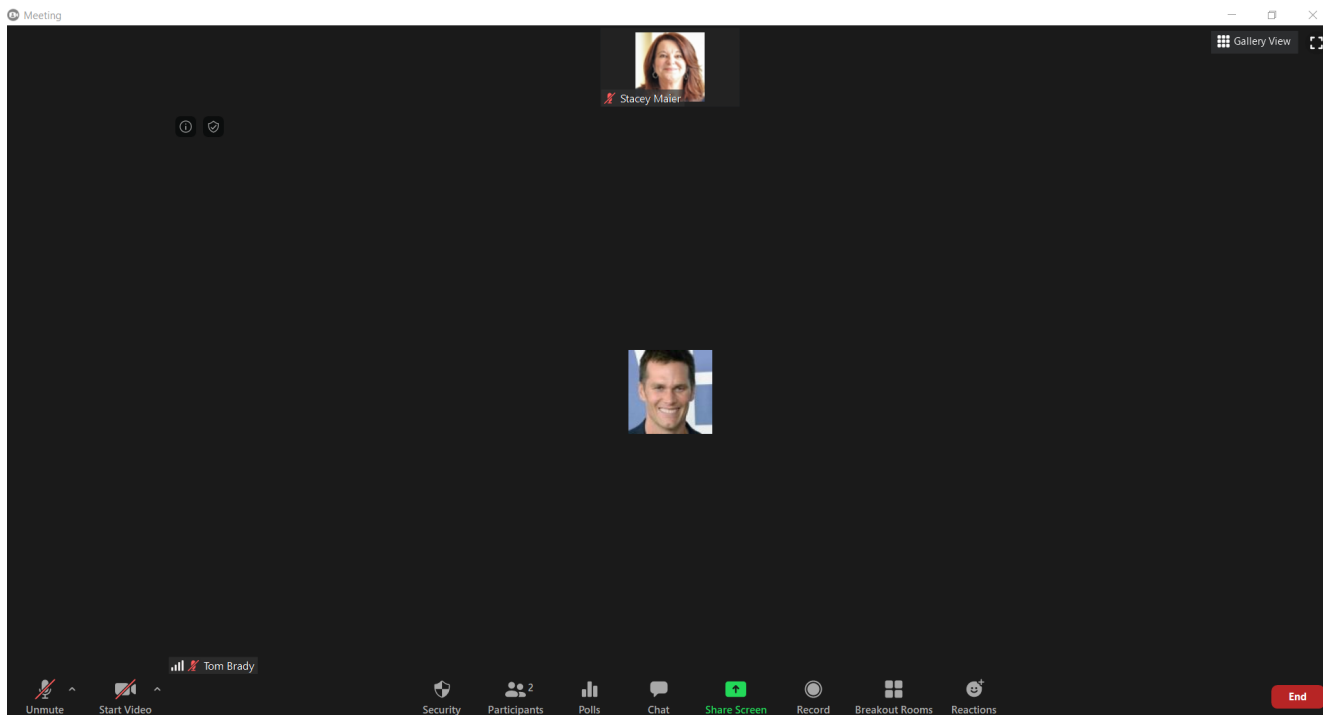
HOST A MEETING

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

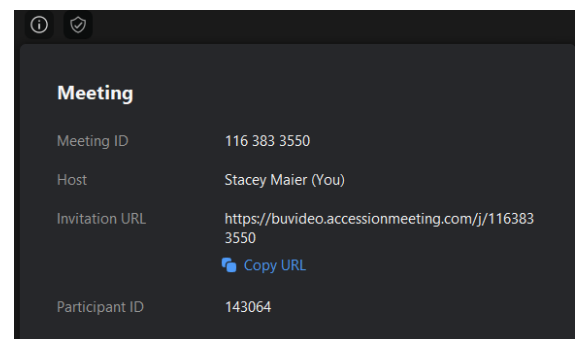
Info will display the information for the Meeting, including the meeting ID, Participant ID and Meeting URL.

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

12

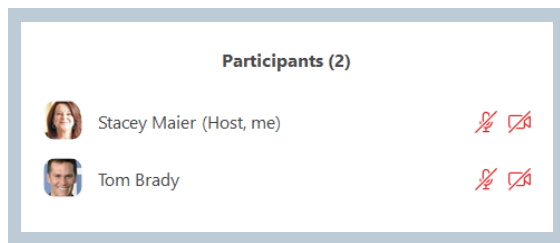
BOTTOM TASK BAR (from left to right)

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

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.

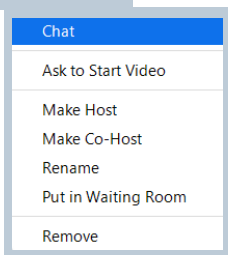
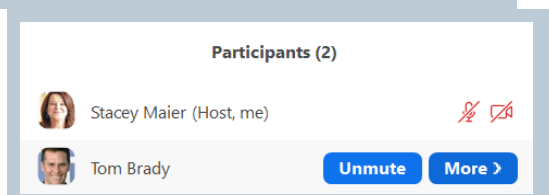
Security click to Lock Meeting, Enable/Disable Waiting Room, Allow/Disallow participants to Share Screen, Chat and rename themselves or, as the host, remove a participant.

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



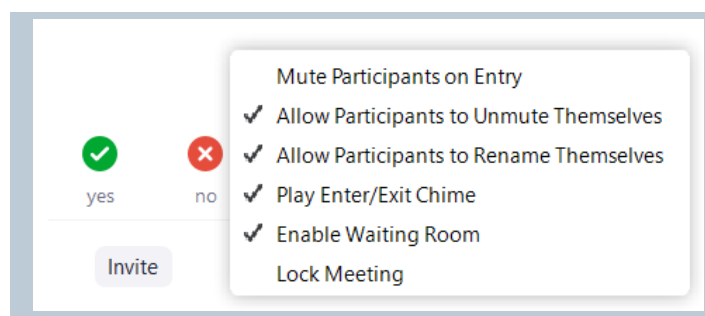
As the host, the following actions are available in the top of the participant window:

- + Click the microphone next to a participant to Mute/Unmute that participant.
- + Click the video next to a participant 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 [Page 17](#) for advanced meeting settings.



The following actions are available in the bottom of the participant window:

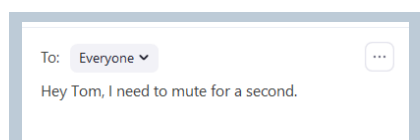
- + **Mute/Unmute** all participants

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 [page 23](#) for 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.

BOTTOM TASK BAR (continued)

Share opens up the share window to enable you to share your screen or parts of your screen with participants. See [page 14](#) for screen share options.

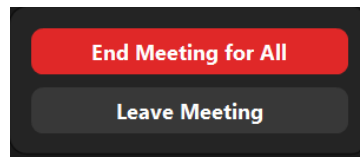
Record will record the call to your local PC. You can access the recorded meeting from the Meetings tab in MaX UC.

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 [page 26](#).

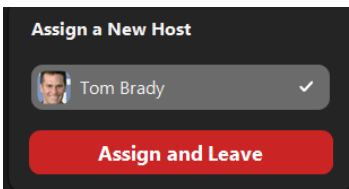
Reactions places an applause or thumbs up emoji on your video window.



End will give you option to leave the meeting or end the meeting for all.



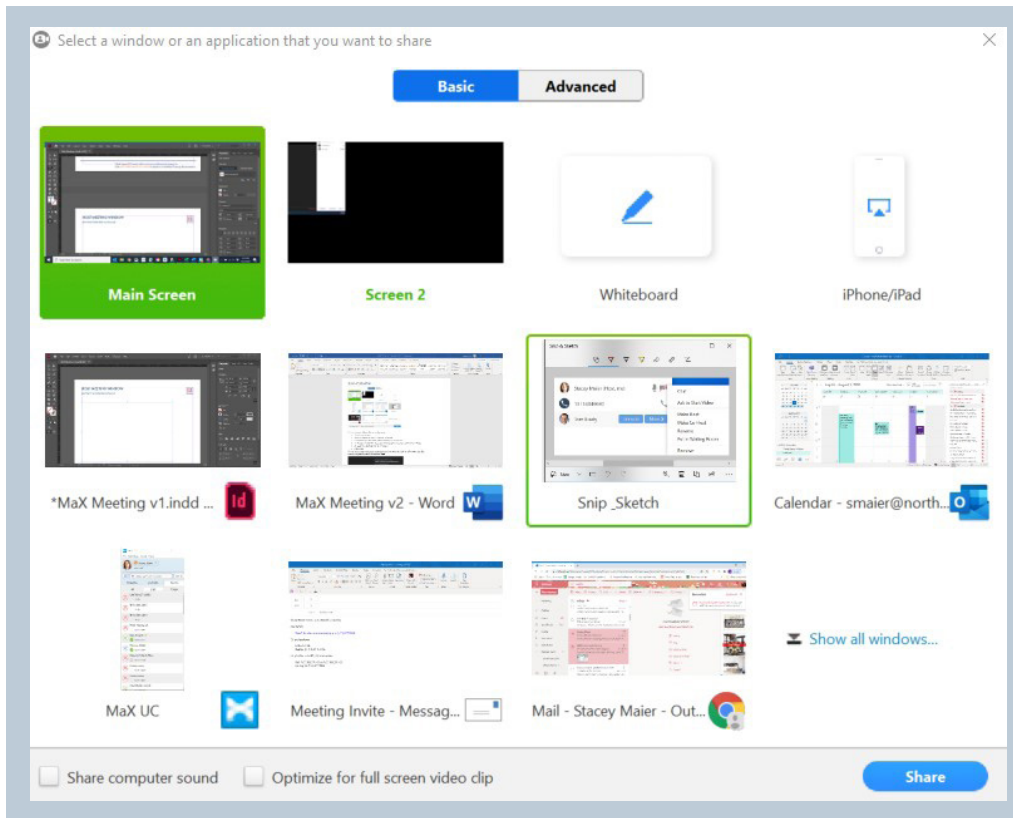
As the host, if you choose to leave the meeting, but wish it to continue, you need to assign someone as a host before you leave. If not host is assigned, you will receive a screen with a list of participants so you can assign one.



SCREEN SHARE

14

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.

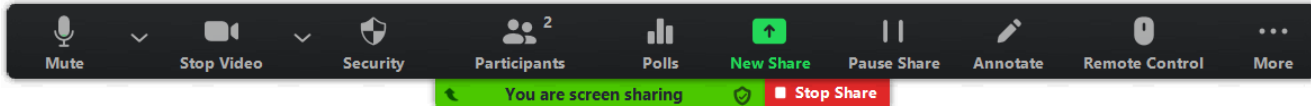
Make the appropriate selection and click **Share**.

NOTES: By default, the meeting will display in "Gallery" view. Meeting participants will be displayed.

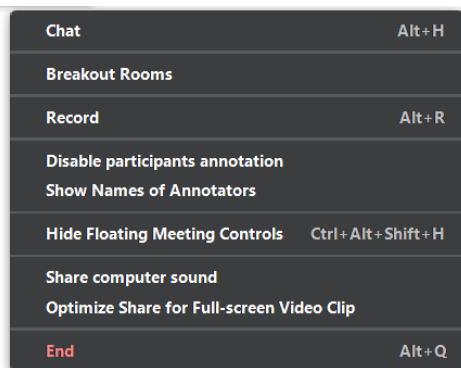
To change to "Speaker" view, click the **Speaker view** button in the upper right-hand corner of the display. The person who is speaking is then displayed.

ADDITIONAL SCREEN SHARE OPTIONS

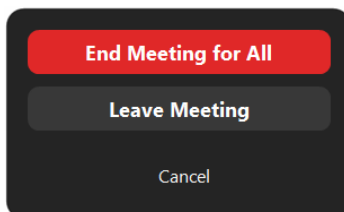
Once in **Screen Share** mode, hover near the top to view additional share options.



- + **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 participants 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.



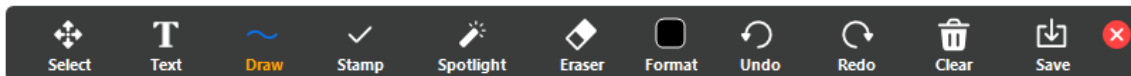
- + **Chat** opens the Chat window.
- + **Breakout Rooms** opens breakout room controls.
- + **Record** records the meeting.
- + **Disable participants annotation** prevents other participants from annotating the shared screen.
- + **Show Names of Annotators** displays the names of others that are annotating.
- + **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

16

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

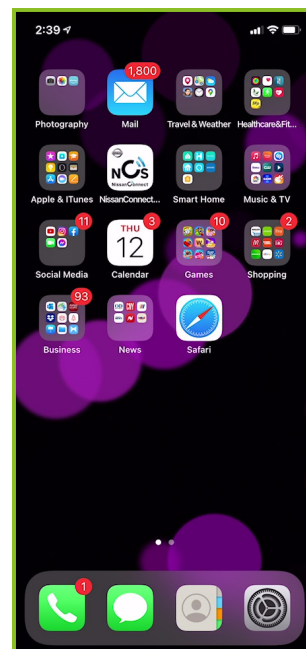
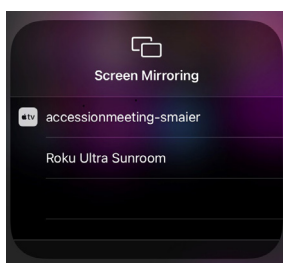
IPHONE VIEW

MEETING VIEW

On your iPhone or iPad:

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.

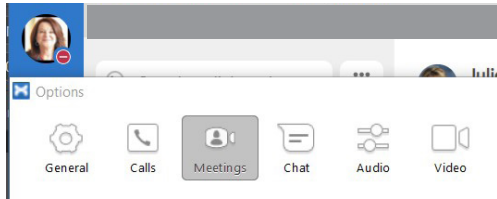
1. Connect to Wi-Fi network **Fire House 1**
2. Tap  **Screen Mirroring**
How to find it: swipe down from the top right corner of the screen
On iOS 11 or earlier, swipe up from the bottom of the screen
3. Choose **accessionmeeting-smaier**
Don't see it? Restart your device



ADVANCED MEETING SETTINGS

17

To work with the Advance 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

SCHEDULE MEETING SECTION - PART I

A screenshot of the 'Schedule Meeting' settings page. At the top, there are three tabs: 'Meeting', 'Recording', and 'Telephone'. The 'Meeting' tab is selected. Below the tabs, there's a left sidebar with links: 'Schedule Meeting', 'In Meeting (Basic)', and 'In Meeting (Advanced)'. The main content area is titled 'Schedule Meeting' and contains two sections: 'Features' and 'Audio Type'. The 'Features' section has two rows. The first row is 'Host video' with a description 'Start meetings with host video on' and a toggle switch that is currently off. The second row is 'Participants video' with a description 'Start meetings with participant video on. Participants can change this during the meeting.' and a toggle switch that is currently off. To the right of the 'Participants video' toggle are links for 'Modified' and 'Reset'. The 'Audio Type' section has a description: '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.' Below this description are three radio button options: 'Telephone and Computer Audio' (which is selected), 'Telephone', and 'Computer Audio'.

- + **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 the recommended setting.

SCHEDULE MEETING SECTION - PART II

Join before host Allow participants to join the meeting before the host arrives	<input checked="" type="checkbox"/>	Modified Reset
Require a password for Personal Meeting ID (PMI) <input checked="" type="radio"/> Only meetings with Join Before Host enabled <input type="radio"/> All meetings using PMI Password 2238 ✎	<input checked="" type="checkbox"/>	Locked by admin
Embed password in meeting link for one-click join Meeting password will be encrypted and included in the join meeting link to allow participants to join with just one click without having to enter the password.	<input checked="" type="checkbox"/>	
Require password for participants joining by phone A numeric password will be required for participants joining by phone if your meeting has a password. For meeting with an alphanumeric password, a numeric version will be generated.	<input checked="" type="checkbox"/>	Locked by admin
The administrator has locked this setting and you cannot change it. All of your meetings will use this setting.		
Mute participants upon entry Automatically mute all participants when they join the meeting. The host controls whether participants can unmute themselves.	<input checked="" type="checkbox"/>	Modified Reset
Upcoming meeting reminder Receive desktop notification for upcoming meetings. Reminder time can be configured in the Meeting Desktop Client.	<input checked="" type="checkbox"/>	

- + **Join Before Host** allows participants to join before the host arrives.
- + **Require a password for Personal Meeting ID (PMI)** when Join before Host is selected, this option is automatically enabled. This prevents unauthorized participants from using the meeting ID. This option is locked by the Administrator and cannot be changed. You can choose to require a password for all meetings using your Personal Meeting ID even when participants will be placed in the waiting room. Click on the pencil to assign a new password.
- + **Embed password in meeting link for one-click join** The meeting password will be encrypted and included in the join meeting link to allow participants to join with just one click without having to enter the password.
- + **Require password for participants joining by phone** A numeric password will be required for participants joining by phone if your meeting has a password. For meeting with an alphanumeric password, a numeric version will be generated. This option is locked by Administration.
- + **Mute participants automatically** will mute all participants upon entry into the meeting. The host controls whether they can later unmute themselves or not.
- + **Upcoming meeting reminder** this will send a desktop notification for upcoming meetings. The reminder time can be configured in the Meeting Desktop.

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.	<input checked="" type="checkbox"/>	Locked by admin
Chat Allow meeting participants to send a message visible to all participants	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Prevent participants from saving chat		
Private chat Allow meeting participants to send a private 1:1 message to another participant.	<input checked="" type="checkbox"/>	
Auto saving chats Automatically save all in-meeting chats so that hosts do not need to manually save the text of the chat after the meeting starts.	<input type="checkbox"/>	
Play sound when participants join or leave Play sound when participants join or leave	<input checked="" type="checkbox"/>	Modified Reset
<input checked="" type="radio"/> Heard by host and all attendees <input type="radio"/> Heard by host only		
When each participant joins by telephone <input type="checkbox"/> Record and play their own voice		

- + **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 Allow the host to add co-hosts. Co-hosts have the same in-meeting controls as the host.	<input checked="" type="checkbox"/>	Modified Reset
Polling Add 'Polls' to the meeting controls. This allows the host to survey the attendees.	<input checked="" type="checkbox"/>	Modified Reset

- + **Co-host** allows the host to assign a co-host to the meeting. The co-host has all of the same tools as the host.
- + **Polling** adds polls to the meeting with questions to be answered by participants. See [page 23](#).

Screen sharing

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



Who can share?

☐ Host Only ☒ All Participants [?](#)

Who can start sharing when someone else is sharing?

☒ Host Only ☐ All Participants [?](#)

Disable desktop/screen share for users

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



- + **Screen sharing** Toggle on/off the ability for host and participants to share their screen or content during meetings.
- + **Who can share?** Select who can share: Host Only or All Participants.
- + **Who can start sharing when someone else is sharing?** Select who can start sharing when someone else is already sharing: Host Only or All Participants.
- + **Disable desktop/screen share for users** Disable desktop or screen share in a meeting and only allow sharing of selected applications.

Annotation

Allow participants to use annotation tools to add information to shared screens



Remote control

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



Nonverbal feedback

Participants in a meeting can provide nonverbal feedback and express opinions by clicking on icons in the Participants panel.



Modified [Reset](#)

Allow removed participants to rejoin

Allows previously removed meeting participants and webinar panelists to rejoin



Allow participants to rename themselves

Allow meeting participants and webinar panelists to rename themselves.



Hide participant profile pictures in a meeting

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



- + **Annotation** Allow participants to use annotation tools to add information to shared screens.
- + **Remote control** During screen sharing, the person who is sharing can allow others to control the shared content.
- + **Nonverbal feedback** Participants in a meeting can provide nonverbal feedback and express opinions by clicking on icons in the Participants panel.
- + **Allow removed participants to rejoin** Allows previously removed meeting participants and webinar panelists to rejoin.
- + **Allow participants to rename themselves** Allow meeting participants 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.

IN MEETING SECTION (ADVANCED) PART I

In Meeting (Advanced)

Breakout room
Allow host to split meeting participants into separate, smaller rooms
☒ Allow host to assign participants to breakout rooms when scheduling
Modified Reset

Remote support
Allow meeting host to provide 1:1 remote support to another participant
Modified Reset

Closed captioning
Allow host to type closed captions or assign a participant/third party device to add closed captions
Modified Reset

Save Captions
Allow participants to save fully closed captions or transcripts
Modified Reset

Far end camera control
Allow another user to take control of your camera during a meeting
Modified Reset

Virtual background
Allow users to replace their background with any selected image. Choose or upload an image in the Meeting Desktop application settings.
Locked by admin

- + **Breakout room** allows meeting participants to be split out into separate, smaller rooms. See [page 26](#).
- + **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.
- + **Far end camera control** allow another participant to take control of the camera during a meeting.
- + **Virtual Background** Allows users to replace the meeting background with any image. Choose or upload an image in the Meeting Desktop application settings. See [page 25](#).

IN MEETING SECTION (ADVANCED) PART II

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

Choose which participants to place in the waiting room:

☐ All participants

☒ Guest participants only ⓘ

☒ Allow internal participants to admit guests from the waiting room if the host is not present

Customize the title, logo, and description ✎

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
Modified Reset

- + **Waiting room** places attendees in a waiting area until the host lets them in individually. When **Waiting room** is enabled, the option for attendees to join before host is disabled. See [Page 28](#).
NOTE: You can see the message attendees see and add a logo to the waiting room.
- + **Choose which participants to place in the waiting room** Choose who is placed in the waiting room, all participants or just guest participants. If choosing guest participants, do you want others to let them into the meeting.
- + **Customize the title, logo, and description** Add a logo, customize the title of the meeting and add a description or helpful information to the waiting room message.
- + **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

Direct call a room system

Enable direct call to a room system from client

☒ Modified [Reset](#)

Invitation Email

Your meeting attendees will receive emails in language based upon their browser/profile settings. Choose languages which your expected attendees will receive content in to edit.

Choose email in language to edit English

[Send me a preview email](#)

Personal Meeting ID

116-7440-3734

<https://buvideo.accessionmeeting.com/j/11674403734?pwd=dEpuCvZpQytuRDIMUEYyVHFINm16Zz09>

Personal Link

<https://buvideo.accessionmeeting.com/my/nrdsmm>

Personal Link is an alias of your personal meeting URL <https://buvideo.accessionmeeting.com/j/11674403734?pwd=dEpuCvZpQytuRDIMUEYyVHFINm16Zz09>. 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 ("").

- + **Direct call a room system** Enables direct calling to a room system from the MaX Meeting client.
- + **Invitation Email** Allows you to choose languages which your expected attendees will receive content in to edit.
- + **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

Recording

Local recording

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

☒ Hosts can give participants the permission to record locally

Automatic recording

Record meetings automatically as they start

☐ Modified [Reset](#)

Recording disclaimer

Show a customizable disclaimer to participants before a recording starts

☐

- + **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 disclaimer** when activated shows a disclaimer to participants that the meeting is being recorded and gives them the option to join or cancel.

TELEPHONE TAB

Mask phone number in the participant list

Phone numbers of users dialing into a meeting will be masked in the participant list. For example: 888****666

☐ Modified [Reset](#)

Global Dial-in Countries/Regions

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

United States of America

- + **Mask phone number in the participant list** phone numbers of participants joining by phone will be disguised.
- + **Global Dial-in Countries/Regions** Choose countries whose users might frequently dial into a meeting.

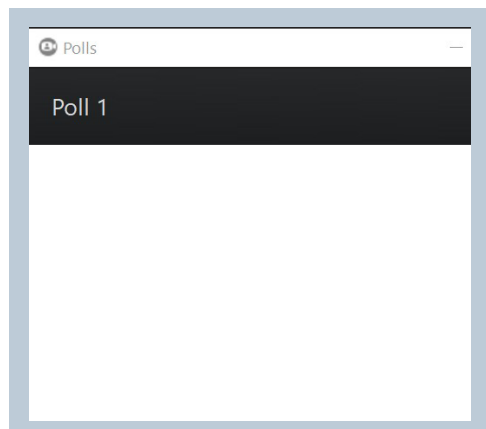
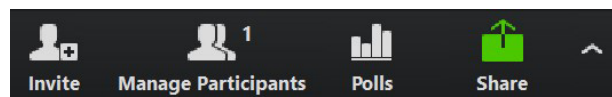
ADVANCED MEETING FEATURES

23

Once the advanced settings have been changed, they are available for all future meetings until they are changed back.

POLLING

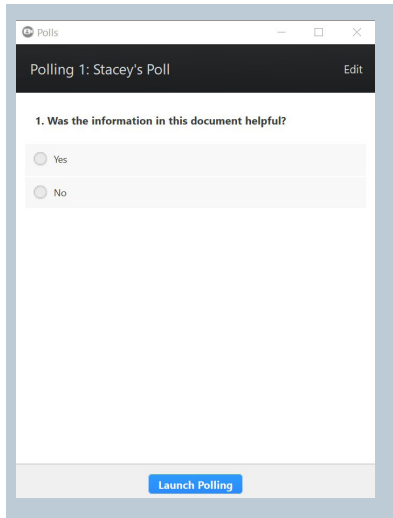
Once polling has been selected in Advanced settings, 'Polls' is added to the meeting controls. This allows the host to survey the attendees. A poll can be added during a meeting or the host can log into the meeting ahead of time and create the poll.



- + Select **Polls** from the taskbar at the bottom of the Meeting window.
- + Select **Ask a Question**. A form fill is displayed to complete the polling information.
- + Poll questions can be single answer (such as yes/no or true/false) or multiple choice.

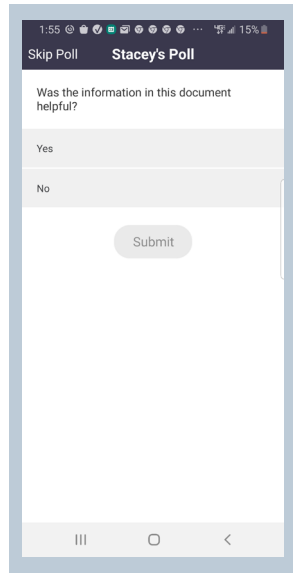
A screenshot of the 'Add a Poll' form. It has a title field 'Enter a title for this poll.' Below it is a numbered list of questions. The first question is '1. Type your question here.' Below the question is a radio button for 'Single Choice' (selected) and a radio button for 'Multiple Choice'. Below these are ten answer fields labeled 'Answer 1' through 'Answer 10 (Optional)'. At the bottom right of the answer fields is a 'Delete' button. At the bottom of the form is a '+ Add a Question' button. At the very bottom are 'Save' and 'Cancel' buttons.

- + Give the poll a name.
- + Enter the first question. Choose **Single Choice** (yes/no or true/false) or **Multiple Choice** answer.
- + Enter the answers.
- + Select **+ Add a Question** at the bottom.
- + When all the questions are complete, select **Save**.



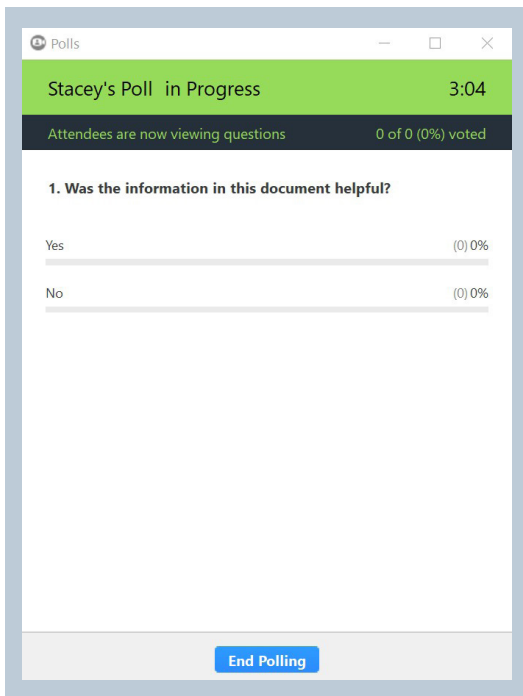
- + Select Polls on the taskbar. The poll is displayed.
- + Select Launch Polling.

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.
- + All answers are anonymous.

What the Host Sees



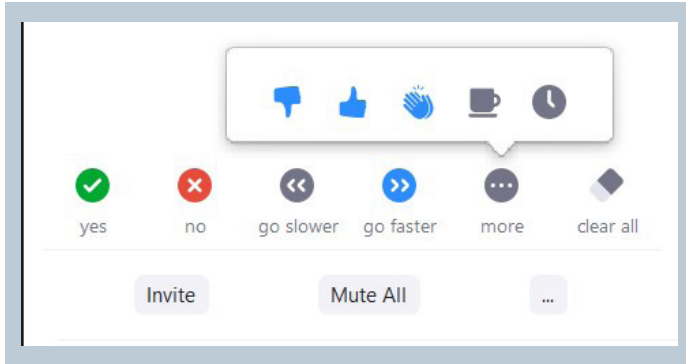
- + As participants complete the poll, the host can see the percentage for each answer.
- + All answers are anonymous.

NON-VERBAL FEEDBACK

25

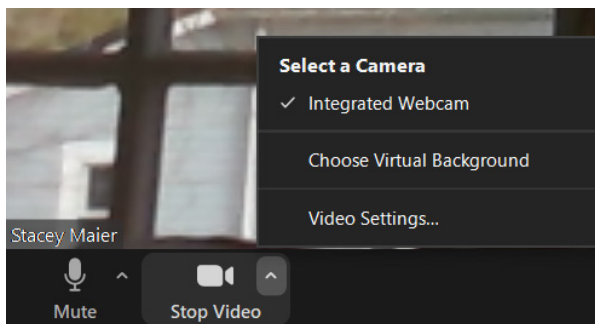
For lengthy or large meetings, non-verbal feedback is an excellent communication tool. It uses symbols to provide feedback to the host and other participants.

Select **Participants** or **Manage Participants** from the **Meeting taskbar** at the bottom. There are additional feedback buttons that everyone in the meeting can view and select. They are also useful for a cohost to help the host stay on track.

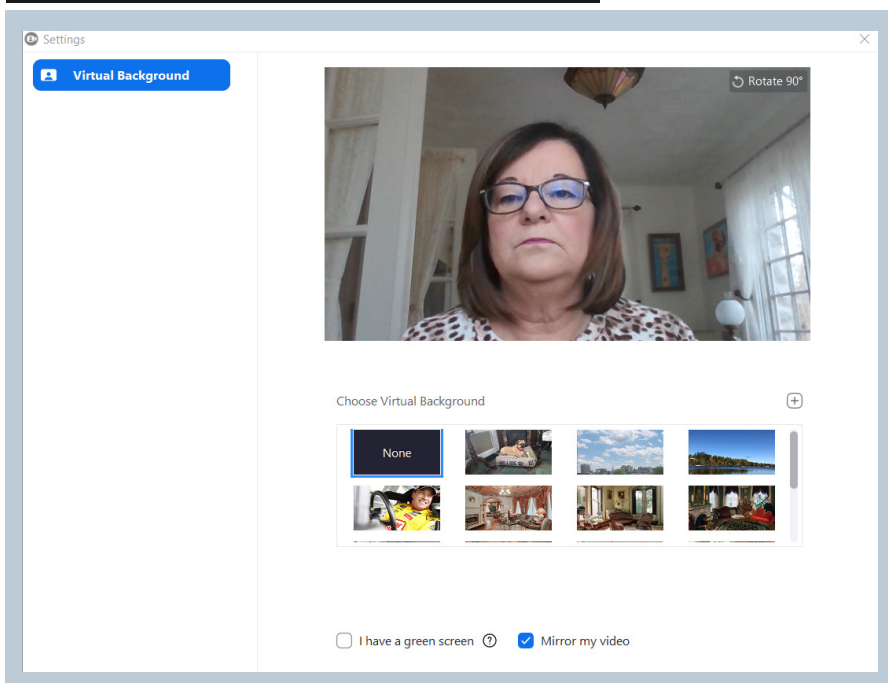


VIRTUAL BACKGROUND

Virtual Background allows participants to replace their background with any selected image. Choose or upload an image in the Meeting Desktop application settings.



- + In the video window taskbar, select the arrow next to the video camera.
- + Select Choose Virtual Background.
- + The Virtual Background window is displayed.

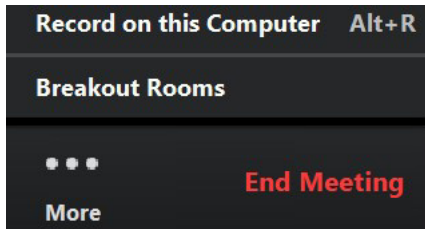


- + Choose your background from the ones you have already downloaded.
- + Click the + to add new backgrounds from your photo library or files.
- + Select **I have a green screen** for a better quality virtual background.
- + Select **Mirror my video** to show your video as a mirror image to yourself.

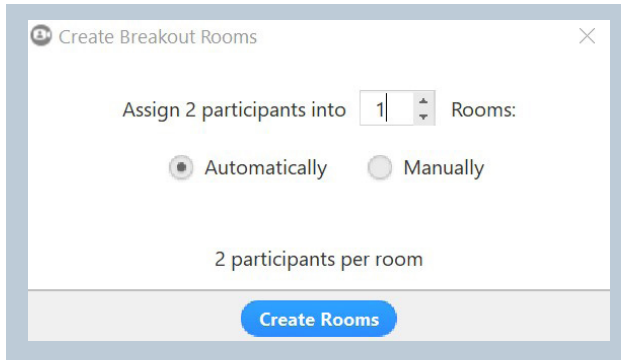
BREAKOUT ROOMS

26

Breakout rooms allow the host or co-host to split participants into smaller meeting rooms. This is useful when conducting group exercises or roll plays.



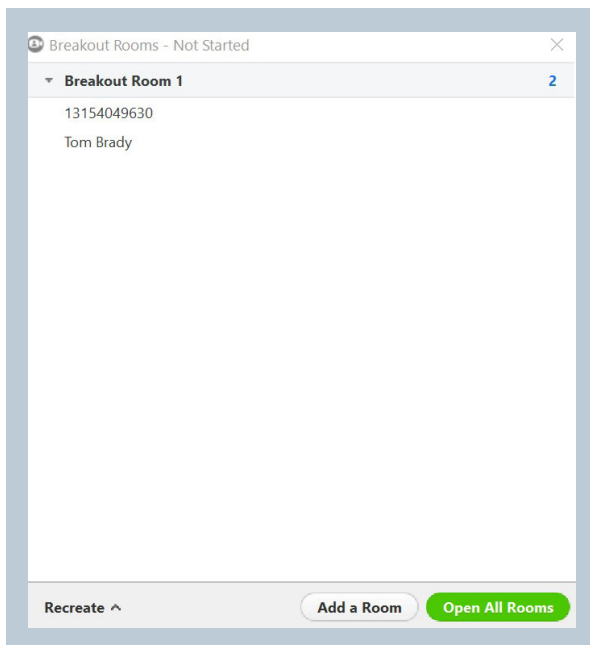
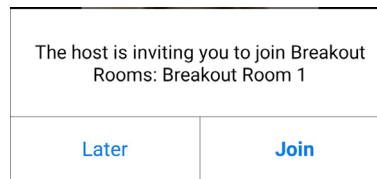
- + On the Meetings task bar at the bottom, select **Breakout Rooms**. Depending on how many advanced tools you are using, you may need to click on **More** to view.



- + 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.

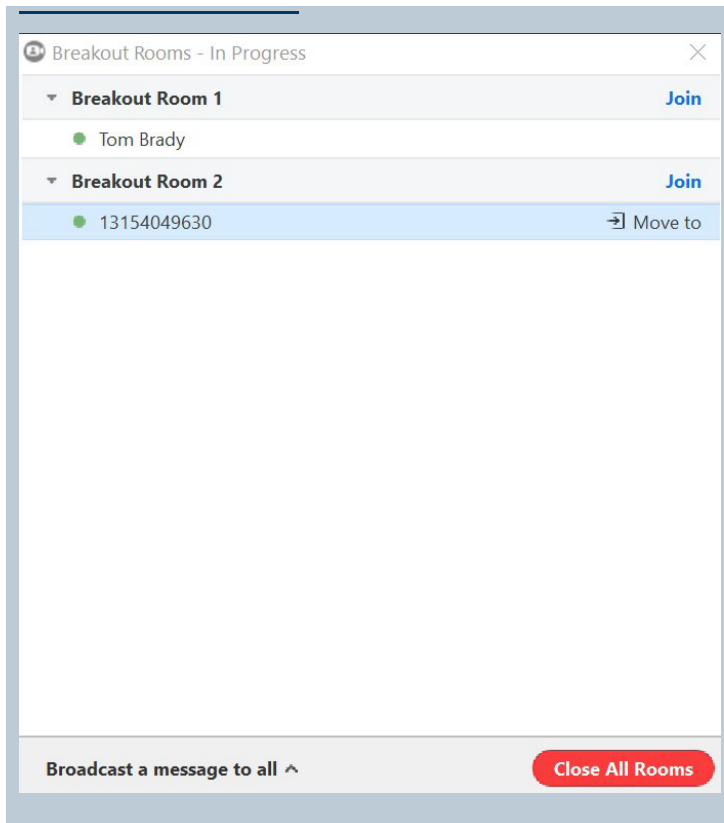
- + Select **Create Rooms**.

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 choose to leave or the room is automatically closed.

Breakout Rooms will close in 60 seconds

You will be returned to the main session automatically.

[Cancel](#)

[Leave Now](#)

WAITING ROOM

28

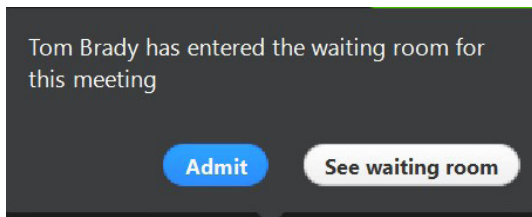
The waiting room places participants in a “holding area” until the host or co-host enters them into the meeting.

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.

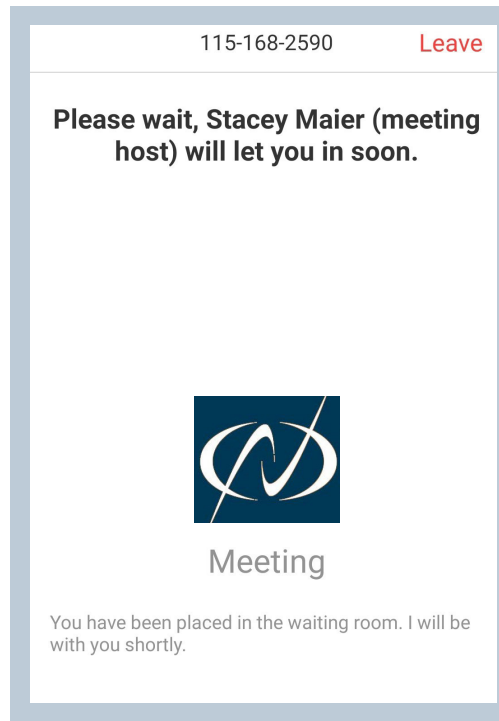
The participants receive a message that they have been placed in the waiting room and the host will be with them shortly.

You can customize the message and add a logo in the **Advanced Meeting Settings** of MaX UC.

What the Host Sees



What Participants See



WORKING WITH SCHEDULING ASSISTANT

29

GIVE OTHERS PERMISSION TO SCHEDULE FOR YOU

Options

General Calls **Meetings** Chat Audio Video

Join

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

Scheduling & Invites

Dial-in number: 315-671-1981
Email invitation **Edit** English (United States)
Changing the email language will not affect custom messages.
Scheduling Assistants: Stephany VanDyke **Add Assistant**

A scheduling assistant can schedule meetings on your behalf.

Meeting

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

Outlook Plugin

Create and schedule online meetings from within Outlook.
Download Outlook Plugin
Outlook 2010 or higher (2007 with limited features).

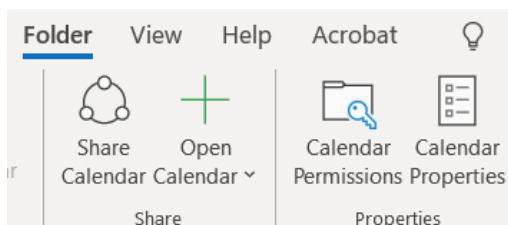
Advanced Settings

- + 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, go the **Folder** tab and select **Calendar Permissions**.
- + Select **Add** to add the person you are granting permission to from your Outlook Contacts.
- + Once they are added to the list, highlight their name and make them an **Author** in the **Permission Level** dropdown.
- + Repeat for each person that you would like to give permission to.
- + Select what permissions you want to give them. Be sure **Create Items** is selected.
- + Click **OK**.

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

SCHEDULE A MAX MEETING ON BEHALF OF SOMEONE ELSE

Schedule meeting
Ashley DeSimone's Meeting

Start: Mon November 16, 2020 04:00 PM

Duration: 1 hour 0 minute

☐ Recurring meeting Time Zone: Eastern Time (US and Canada)

Meeting ID
☒ Generate Automatically ☐ Personal Meeting ID 115-5111-9198

Password
☐ Require meeting password

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

Audio
☐ Telephone ☐ Computer Audio ☒ Telephone and Computer Audio

Dial in from United States [Edit](#)

Calendar
☐ Outlook ☐ Google Calendar ☒ Other Calendars

Advanced Options
☒ Enable Waiting Room
☐ Enable join before host
☐ Mute participants on entry
☐ Automatically record meeting on the local computer
☒ Schedule for:
Ashley DeSimone

Schedule **Cancel**

- + 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"

Meeting - Schedule Meeting

Your meeting has been scheduled.
Click the button below to copy the invitation to clipboard.

Ashley DeSimone is inviting you to a scheduled meeting.

Topic: Ashley DeSimone's Meeting
Time: Nov 16, 2020 04:00 PM Eastern Time (US and Canada)

Join Meeting
<https://buvideo.accessionmeeting.com/j/1156704309>

Meeting ID: 115 670 4309
One tap mobile
+13156711981,1156704309# US

Dial by your location
+1 3156711981 US
Meeting ID: 115 670 4309
Find your local number: <https://buvideo.accessionmeeting.com/u/nullsau00EQm>

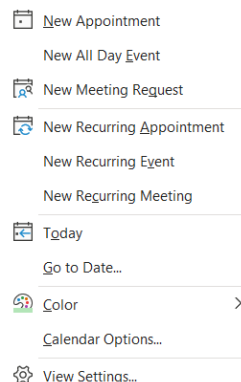
Join by SIP
1156704309@zoomcrc.com

Join by H.323

Open with default calendar (.ics) **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 COMPATABILITY (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