

# MaX MEETING STANDALONE QUICK REFERENCE GUIDE



## GETTING STARTED

MaX Meeting provides audio and video conferencing over the internet, including web collaboration features such as screen sharing, whiteboard annotations, and presentation capabilities.



## FIND YOUR PASSWORD

You need your **CommPortal** phone number (or email address if you have set this up) and password to start using MaX Meeting. If you don't have this information, call us at [315-624-2033](tel:315-624-2033).

You will be prompted to change the password as part of completing the login process.

## DOWNLOAD AND INSTALL THE SOFTWARE

Download MaX Meeting for MAC here:

[MaX Meeting for MAC](#)

Download MaX Meeting for Windows here:

[MaX Meeting for Windows](#)

When prompted, save the file, then find the file in your downloads folder and open it to begin the installation process.


If you are using Outlook, also download the Outlook Calendar plugin here:

[Outlook Plug-In for MaX Meeting](#)

## SET UP A MEETING

You can choose to start an instant meeting from the **MaX Meeting** client or directly from your Outlook calendar.

- In the **MaX Meeting** client, click the **Start Without Video** or **Start With Video** button.
- From the Outlook Calendar, select the **Start Instant Meeting** button in the Outlook Toolbar.

Within **MaX Meeting**, you can click the  **Invite** button at the bottom of the screen to send a meeting invitation after starting your meeting. You can then invite users via email or invite a SIP or H.323 room system to your meeting.

## SCHEDULE A MEETING

You can use **MaX Meeting** to schedule a one-off or recurring meeting.

Select **Schedule A Meeting** from the **MaX Meeting** client or directly from your Outlook calendar to launch the **Schedule A Meeting** window. Here, you can set the date, time, and length of the meeting, and specify various other audio and video settings for the meeting.

Click **Schedule** to open the meeting invitation and select the participants to invite before sending the invite. The meeting is added to the participant's calendar.

## JOIN A MEETING

You can join a meeting by clicking on the **Join** button and entering the Meeting ID or by opening the Meeting URL in a browser.

## EXPLORE THE MEETING WINDOW

While a meeting is in progress, you will either see the participant toolbar or the host toolbar at the bottom of the Meeting window.

### Participant toolbar:



### Host toolbar:







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## SET UP YOUR AUDIO

Use the **Microphone** icon to toggle your microphone on  and off .

Use the **Video** icon to toggle your video on  and off .

Select **Join Audio** to allow **Meeting** to use either your phone or your computer's microphone and speaker.

Select **Leave Audio** to prevent **Meeting** from using your speaker and audio device.

## ACCESS THE SETTINGS MENU

Click on **Settings** to access the **Settings** menu, where you can set up and test your microphone, speakers, and video. You can also use the **Settings** menu to specify where to save recorded meetings and to access additional application settings.


## INVITE CONTACTS TO A MEETING

Click on **Invite** and select the contacts you want to invite to join you in the meeting. The contacts you select are then sent a meeting invitation.

## VIEW MEETING PARTICIPANTS

Click on **Participants** to see who has joined the meeting. You can access the following options from the **Participant** window.

- + Mouse over your name to mute/unmute yourself or change your display name at the foot of the screen
- + **Mute Me** - put yourself on mute
- + **Raise Hand** - let the meeting host know you have something say.
- + **Reclaim Host** - allows you to take back the role of meeting host.







If you are the meeting host, click on  **Manage Participants** to access the **Participants** window.

Meeting hosts can use the Mute All or Unmute All options at the foot of the screen to mute or unmute participants.

Select **More** to access additional options, including:

- + **Mute Participants on Entry** - mute all attendees as they join the meeting.
- + **Play Enter/Exit Chime** - when a participant joins or leaves the meeting.
- + **Lock/Unlock Meeting** - no new attendees can join if the meeting is locked.
- + **Lock Screen Share** - only the meeting host can share their screen.

The following icons provide additional information about each attendee.

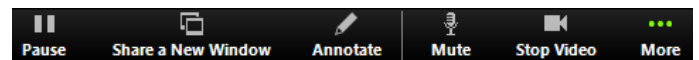
-  The participant is speaking.
-  The participant's microphone is on.
-  The participant's microphone is muted.
-  The participant's video camera is on.
-  The participant's video camera is off
-  The participant has raised their hand.

## SHARE YOUR SCREEN

Click on **Share Screen** and choose the desktop or individual application window that you want to share.

Note: The **Share Screen** option may not be visible if the meeting host has selected **Lock Screen Share**.

Once you are sharing your screen with meeting participants, you can see the Screen Share toolbar.



The **Screen Share** toolbar provides the following options:

- + **Pause/Resume** - pause or resume screen sharing.
- + **Share a New Window** - select a new window to share.
- + **Annotate** your shared screen using a variety of shapes and highlight tools, including: a Mouse; Draw options (lines, shapes, and arrows); a Spotlight tool; an Eraser to remove selected annotations; and Undo, redo and clear annotation options.


Note: The Annotate option may not be visible if the host selects Disable Attendee Annotation.

- + **Mute** - toggle your microphone on and off.
- + **Stop/Start Video** - toggle your video sharing on and off.
- + **More** - access Chat, Record, Settings, and Audio Conference options.

Click  **Stop Share** below the toolbar to exit screen sharing.

## SEND A MESSAGE TO MEETING ATTENDEES

Click on **Chat** to open a Chat window and send a message to another meeting attendee.

Click on  **Save Chat** to save the conversation to your local computer.


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## RECORD YOUR MEETING



Click on **Record** to start recording the meeting. Click  to end recording.

When the meeting ends, you will see a pop-up saying that the meeting recording is being saved and converted to mp4 format.

The directory containing the saved recording then automatically opens showing the recorded file, and the meeting also appears in your list of recorded meetings within the Meeting application.

You can specify the directory to save recorded meetings to using the **Settings** menu.

Note: The **Record** option may not be visible if the meeting host has disabled recording for the meeting.

## LEAVE THE MEETING

Click on **Leave Meeting** to leave the meeting.

If you are the meeting host, click **End Meeting** to end the meeting for all participants.

## ADDITIONAL MEETING WINDOW OPTIONS



Extends the meeting display to full-screen.



Exits the full-screen display.



Displays the video for all meeting participants.



Displays the video for the current speaker.

