Telesystem
Video Conferencing

MaX UC Meeting with Webinar

Webinar User Guide

Telesystem®

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1 Description and Getting Started

MaX UC Webinars is a full featured webinar produced hosted entirely from the cloud. It allows you to host webinars that can include registration of attendees, custom questions, attendee lists, Q&A, polling, and chat functionality for the attendees.

The maximum of attendees you may have in your webinar is based on your purchased license type, but is a minimum of 100.

Webinar users are licensed to use the full MaX UC Meeting suite which includes the following in addition to webinar capabilities:

- **Voice**: make and take calls from the application on your mobile or desktop computer.
- **Chat:** send and receive instant messages to other MaX UC users in your organization
- **Presence**: see the availability of other MaX UC users in your organization
- **Meeting**: schedule and host Meetings which will provide a more collaborative experience with all participants.

This guide focuses only on the Webinar capabilities for MaX UC users. For more information about all capabilities above, please see the other MaX UC guides found at www.telesystem.us.

Hosts of Webinars must first **download** and **login to** the MaX UC desktop application.

- To download, visit https://www.telesystem.us/uc-green/
- To login, use your account credentials. This is your Telesystem direct **telephone number** and **password** for the webinar account**.**

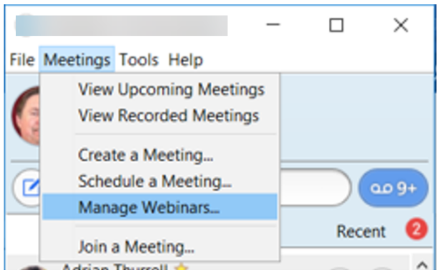
If you have any questions or require login assistance, please contact your system administrator or Telesystem directly.

The remainder of this guide assumes that you have successfully installed and logged into the MaX UC application on your PC or MAC computer.

2 Meeting Webinars

To access the Meeting Webinars UI:

- Open your MaX UC Desktop client.
- Select the **Meetings** menu.
- Click *Manage Webinars*.



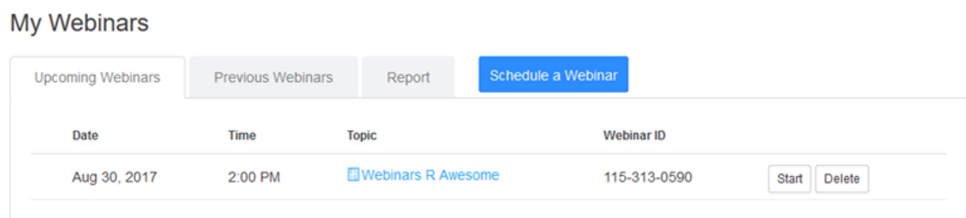
You will then see the **My Webinars** page shown in Section 3 where you can schedule, manage, and generate reports on your webinars.

3 Creating a Webinar

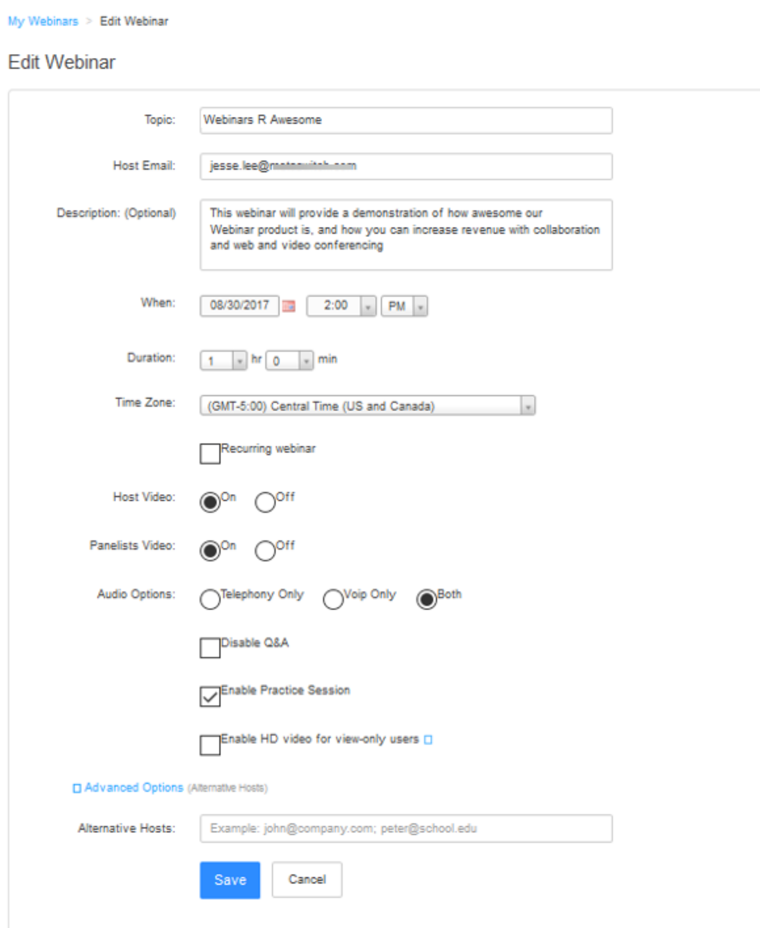
To create a new webinar:

1. Click the *Manage Webinars* link in MaX UC Desktop, as shown in section 2.

2. Select the Schedule a Webinar tab.



3. You will now see the **My Webinars** page.



Enter the following information about your Webinar:

1. Enter the **Topic** of your webinar.
2. Enter the **Host Email** address (your email).
3. If required, enter a **Description** for the webinar.
4. Use the entry fields alongside **When** to select the date and start time of your webinar.
5. Select the **Duration** of your webinar.
6. Select the **Time Zone** of your webinar.
7. Select if you will want **Host Video** On or Off when the host joins the webinar.
8. Select if you will want your **Panelists Video** On or Off when the panelists join the webinar.
9. Select which audio options you want to allow:
    - Telephone (Dial-in) Only
    - VoIP Only
    - Both Telephone (Dial-in) and VoIP
10. Select the checkbox if you want to **Disable Q&A** for the webinar.
    - If disabled, attendees will not see the Q&A tab during the webinar.
11. Select the checkbox if you want to allow **Practice Session**.
    - When selected, you and your panelists can get set up and familiarize yourselves with the Meeting Webinar controls before your webinar starts.
12. Select the checkbox to **Enable HD video for view-only users**.
    - NOTE: Enabling HD video will greatly increase the bandwidth used. Do not enable this option if several people will join from the same location.
13. Select the checkbox next to **Advanced Options** if you need to add any Alternative Hosts (Co-Host), and enter their email address(es) in the field provided.
14. Click the **Schedule** button at the bottom of the page to schedule the webinar. Once the webinar is scheduled, you will be able to create a custom invitation to attendees, assign panellists, configure registration rules, and much more, as described in Section 4.

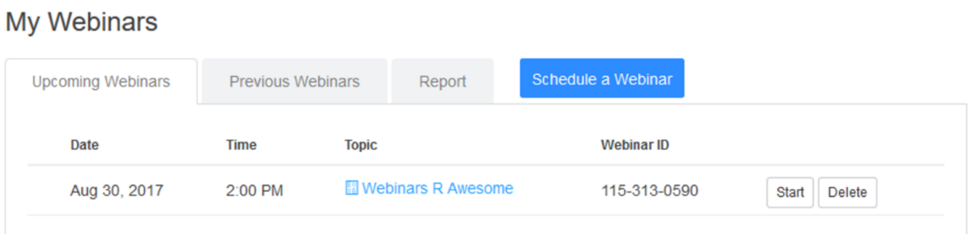
4 Manage Your Webinar

Once you have created your webinar, as described in section 3, you must configure the management options available for your webinar, including inviting attendees, setting registration options, and more.

To manage your webinar:

1. Go to the **My Webinars** screen.

2. On the **Upcoming Webinars** tab, click the **Topic** link to open the webinar you wish to manage.

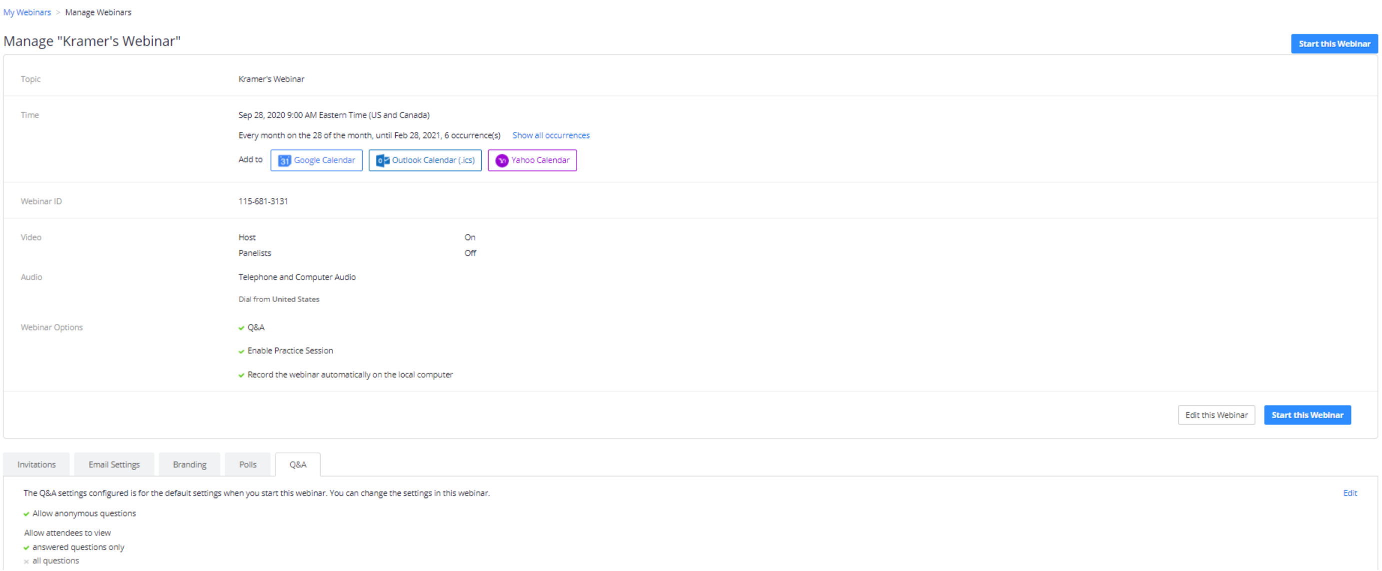


The Manage Webinars screen that appears has a number of panels where you can configure a range of settings for this webinar, as described in the rest of this section.

4.1 Manage Webinar Basic Settings

The first panel allows you to change the basic settings of your upcoming webinars.

If you need to make any changes to a webinar, click its *Topic* title. You can then manage many of the settings from the next screen. To modify the basic details of the webinar click *Edit this Webinar* button or choose one of the tabs below the details. If you need any background on the basic settings, see section 3.



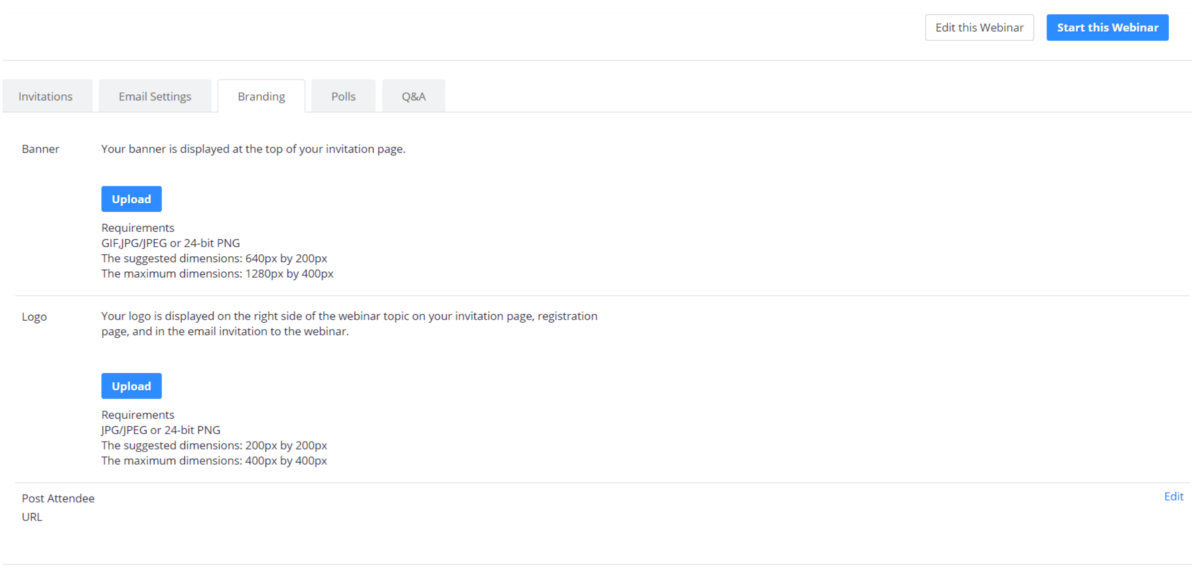
4.2 Branding Your Webinar Invite

You can customize the email invitation that is sent to the people you are inviting to your Meeting Webinar by adding a customer banner or logo.

To add a banner or logo to your webinar invite:

1. Scroll down the Manage Webinars screen to the **Branding** section.

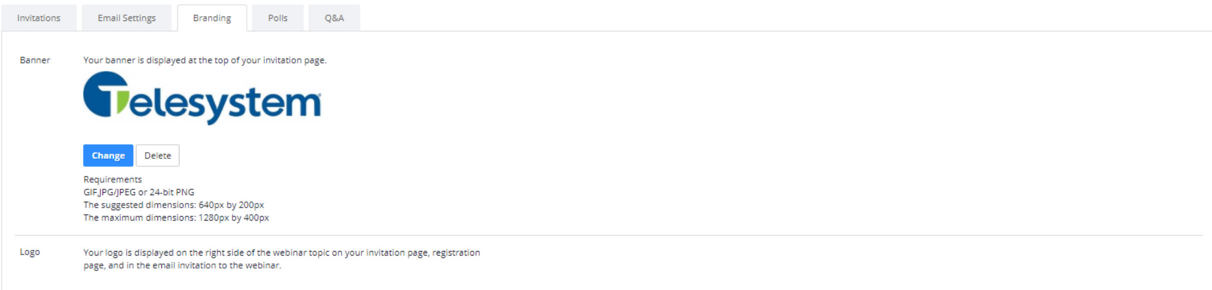
   This screen sets out the required format for the banner image and logo files. You must have these files saved on your computer ready to upload them.



2. To add a banner to your email invitation, click on the *Upload* link in the Banner section.

3. To add a logo to your email invitation, click on the *Upload* link in the Logo section.

Once you have uploaded the image for your banner and/or logo, you will see a preview of the image(s) that will be used in your email invitation.

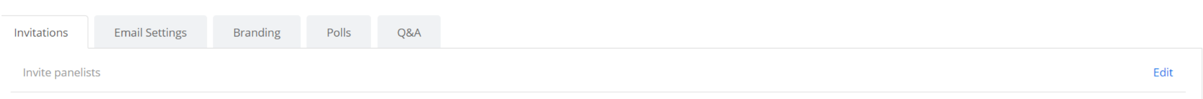


4.3 Inviting Panelists

You can have up to 100 Panelists in your webinar. This total includes the Host and any Co-Hosts.

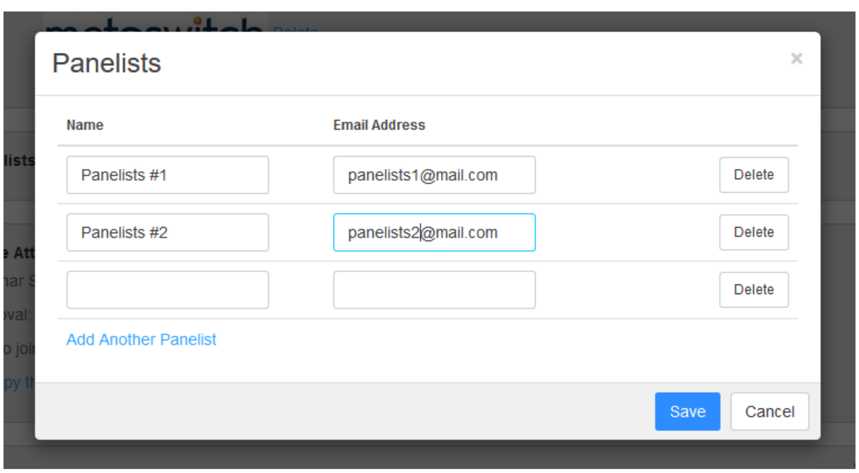
To add Panelists to your webinar:

1. Scroll down the **Manage Webinars** screen to the Invitations – Invite panelists section.



2. Click the *Edit* link.

3. The **Add Panelists** interface panel appears.



4. Enter each panelist's Name and E-mail Address.

5. Click *Add Another Panelist* if you need to add further panellists.

    - You can add up to 100 panelists (including the host and any co-hosts)

    - You can delete or add panelists at any time before the Webinar starts.

6. Press *Save* to send invites to the new Panelists entered.

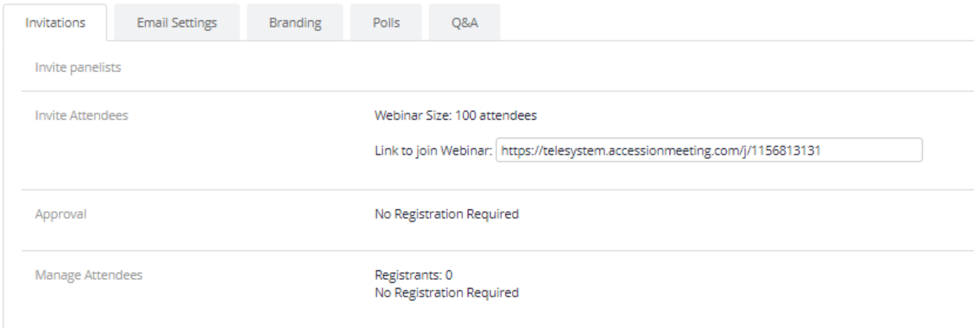
4.4 Managing Attendees

Attendees are view-only participants who cannot share their video or audio during the webinar. Attendees will see the active speaker view of the webinar and the screen share of the webinar if the screen is being shared. Attendees interact with the Hosts and Panelists using the Q&A and chat panels.

To invite Attendees to register or attend your webinar:

1. Go to the **Manage Webinars** page.

2. Scroll down the page to the **Approval** section.



3. Click **Edit** to the right to manage.

4. You will then see the panel where you can carry out the steps described in the following sections.

- 4.4.1, Registration Types
- 4.4.2, Registration Questions
- 4.4.3, Sending the Invitation
- 4.4.4, Managing Registrations

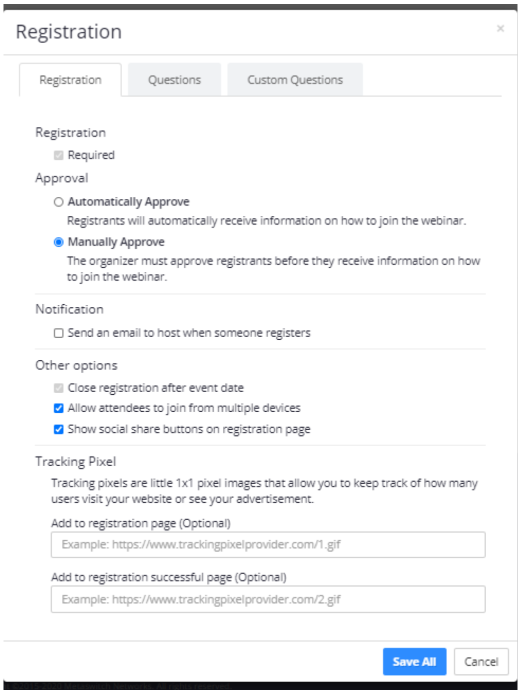
4.4.1 Registration Types

You can choose from three approval methods on the Registration Panel when inviting attendees to register for your webinar:

1. **No Registration Required**. With this method, registrants simply enter their email address and display name when they join the webinar. This method is the simplest for the Attendees, but allows you to capture only the email address and name of people attending the webinar

2. **Automatically Approve**. With this method, registrants will automatically receive information on how to join the webinar after they enter any information you have required a registering attendee to provide. This method is useful when you want to capture specific information about attendees, but will allow anyone to register for the webinar. See section 4.4.2 for information you can capture during registration.

3. **Manually Approve**. This method requires the organizer to approve registrants before they receive information on how to join the webinar. This method is useful when you want to capture specific information about attendees and be selective about who you will allow to attend the webinar. See section 4.4.2 for information you can capture during registration.



From this panel you can also use the checkboxes to

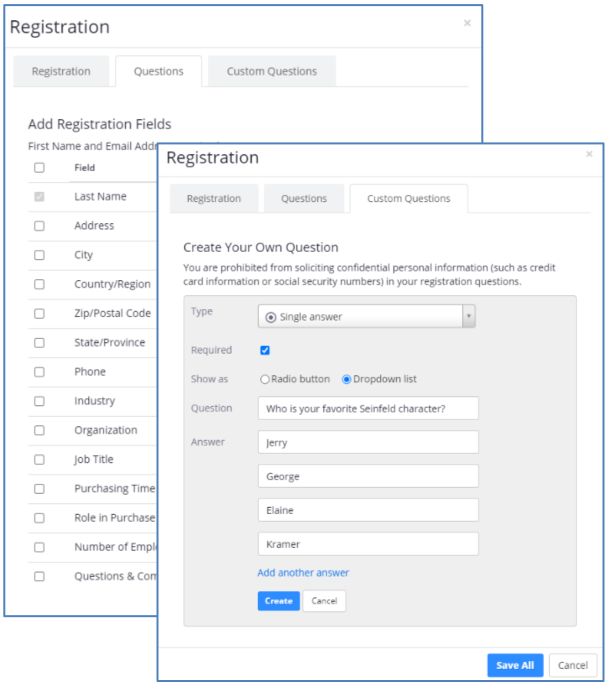
- Send an email to the host when someone registers
- Close registration after the event date
- Show social share buttons on registration page

4.4.2 Registration Questions

The Registration *Questions* and *Custom Questions* tabs allow you to gather information from your registrations before they can attend your webinar.

To manage the questions presented to attendees during registration:

1. Click on the **Questions** tab in the Registration Panel.



2. Use the checkboxes to choose the standard questions and select whether you require the attendee to enter specific information before they are allowed to register.

3. If you want to create custom questions, select the **Custom Questions** tab.

4. On this screen, you can either create questions that require a short answer from the attendee, or present them with multiple choice options.

   - Enter the details for the first question.
   - If you want to add further questions, click **Add another question**.
   - Once you have entered all your questions, click **Save All**.

4.4.3 Sending the Invitation

Once you have completed setting up the registration type and entering any questions you want attendees to answer when registering for your webinar, you will see the Registration URL for this webinar on the **Invitation** panel, as shown below.

To receive a copy of the webinar invitation email that will be sent to attendees in your default mail client, click **Email me the invitation**.

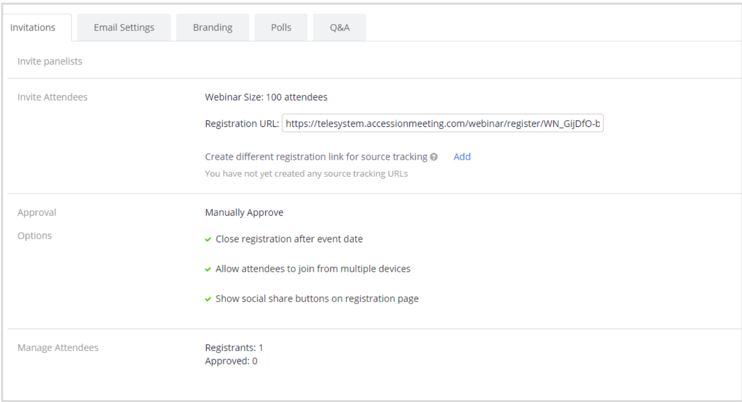
4.4.4 Managing Registrations

If you have chosen to manually approve registration in section 4.4.1, you will need to approve each registration request. If you selected **Send an email to host when someone registers**, you will receive an email notification each time someone registers for the webinar.

To manage registrations:

1. Go to the **Manage Webinars** page

2. Scroll down the page to the **Invitations** tab. In this section, you will see the number of Registrants and the number that you have already approved.



3. To manage the attendees, click the **Edit** link to open the registration management panel.

4. Select the checkbox for each registrant that you want to manage and click either the Approve or Deny button as appropriate.

5. Once you have approved the registration, the attendee will receive an email with the link to join the meeting.

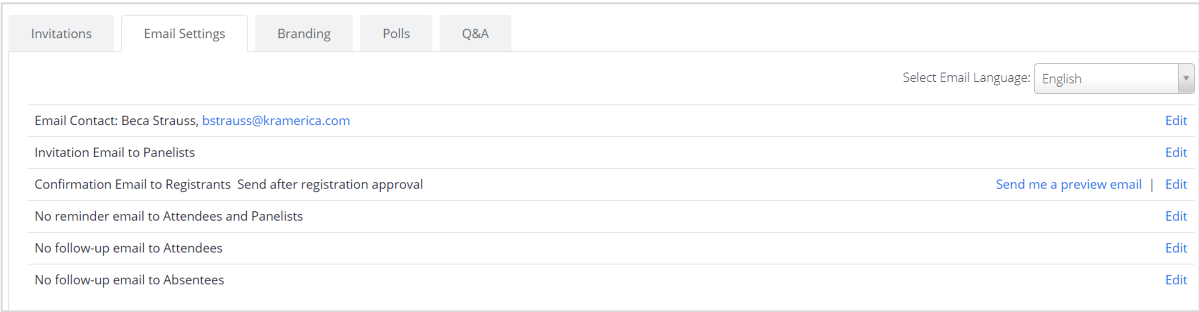
6. If you need to change the registration status of a registrant that you have already approved or denied, you can change the registration by selecting the **Approved** or **Denied** tabs on the registration management panel.

4.5 Reminder and Follow-up Email Settings

You can set up Meeting Webinars to send reminders and follow-up emails automatically to your panelist and attendees.

1. Go to the Manage Webinars page.

2. Scroll down the page to the **Email Setting** section. This will show what you have currently configured and allows you to make any changes.

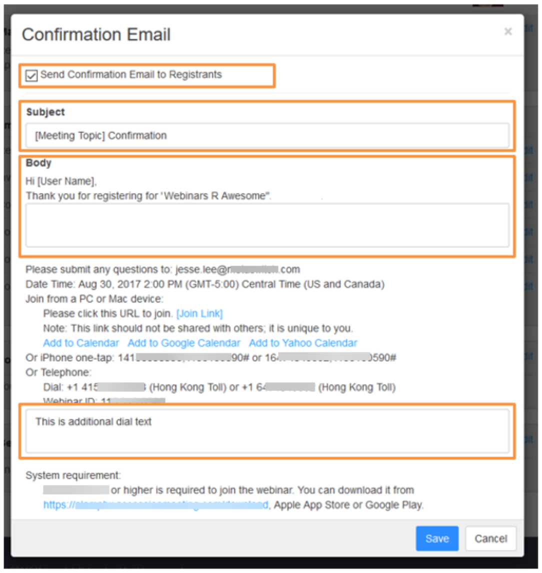


3. Click Edit to change any of the details on this screen.

- By clicking Edit opposite **Reply-to:** you can change the name and email address of the reply to contact in the email invitations.

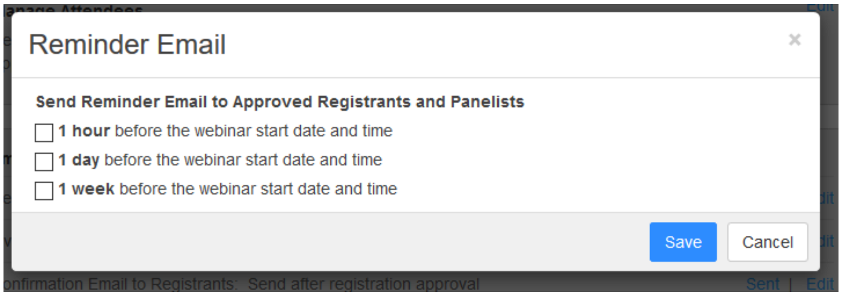
- By clicking Edit opposite **Invitation Email to Panelists**, you can select to send or not send an invitation email to your panelists.

- By clicking Edit opposite **Confirmation Email to Registrants**, you can modify the confirmation email received by attendees.

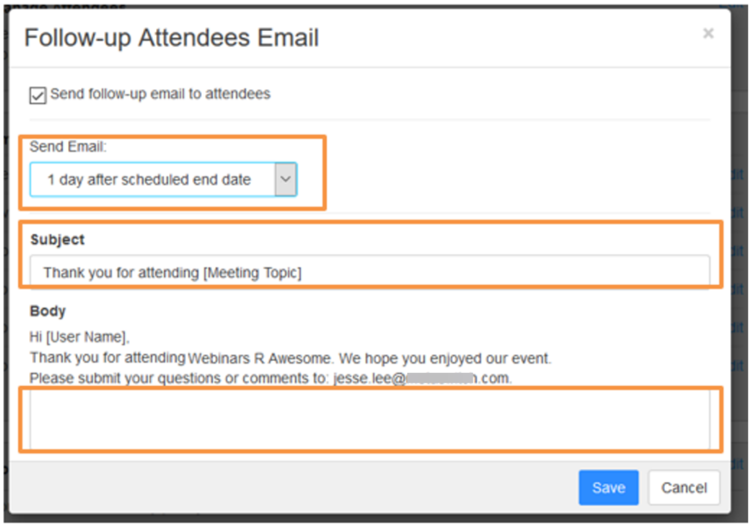


- In this panel, you can modify the email Subject as well as provide additional text for the Body of the email and dial-in section**.**

- By clicking Edit opposite **Reminder email to Attendees and Panelists**, you can use the checkboxes to choose to send multiple reminder emails to those joining the webinar.



- By clicking Edit opposite **Follow-up Email to Attendees** you can choose to send an automatic follow-up email to everyone that attended your webinar.



    - You can use the **Send Email** dropdown to select to send the email between 1-7 days after your webinar.

    - You can also customize the email subject and provide additional text in the body of the email.

- By clicking Edit opposite **Follow-up Email to Absentees**, you can choose to send an automatic follow-up email to everyone that registered for your webinar but did not attend.

    - You can use the **Send Email** dropdown to select to send the email between 1-7 days after your webinar.

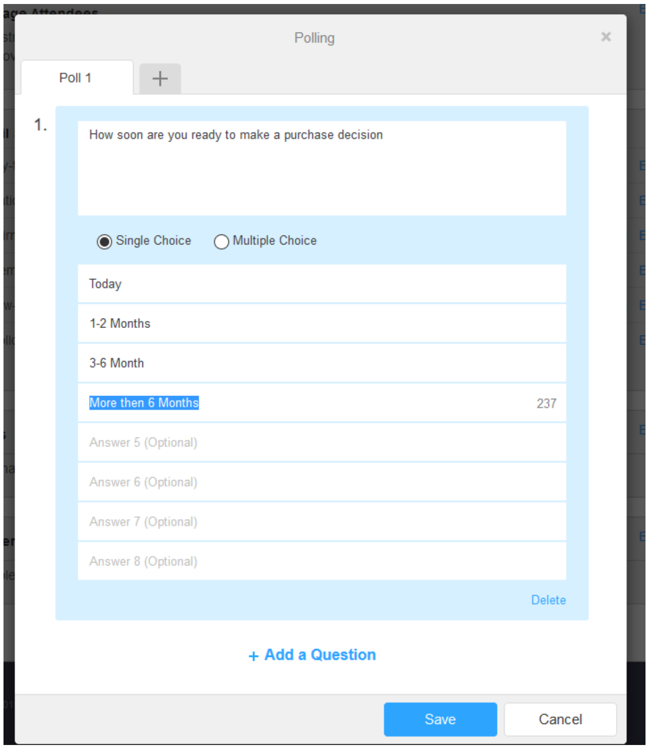
- You can also customize the email subject and provide additional text in the body of the email.

4.6 Creating and Managing Polls

You can create and manage polls that will be presented to your webinar attendees to capture information throughout your webinar.

To create a new poll for your webinar:

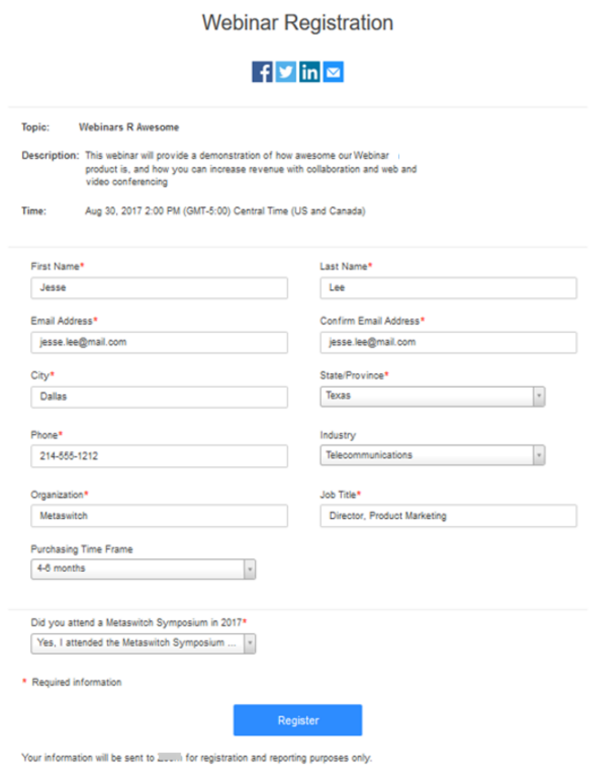
1. Go to the Manage Webinars page.
2. Scroll down and select the **Polls** tab. This will display the **Polling** management panel.
3. Click on **Add** and you will see the **Add a question** panel



4. Enter your first question and answer(s).
5. To add further questions, click **Add a Question**.
6. Once you have added all the questions for this poll, click **Save**.
7. To add an additional Poll, click the + tab at the top of the page.

4.7 Attendees Registering for the Webinar

When the attendees you have invited receive the invitation to register, they can click on the registration link to access the web-based registration page. The registration page details and branding will appear as you've configured for that webinar.



To register, the attendee clicks the **Register** button at the bottom of the screen.

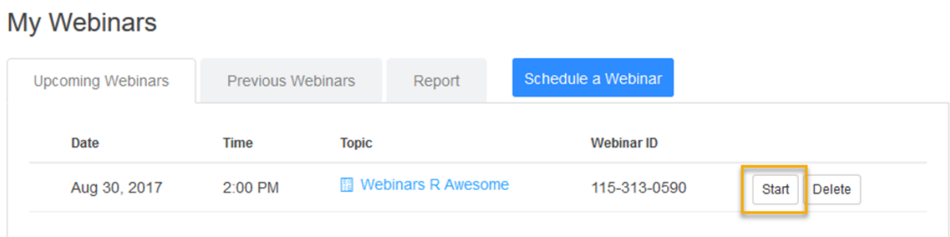
Once the Attendee has registered and their registration has been automatically or manually approved, they will receive an email with details on how to join the webinar.

5 Starting Your Webinar

To start a webinar:

1. Go to your My Webinars page

2. Click the Start Button next to your webinar.



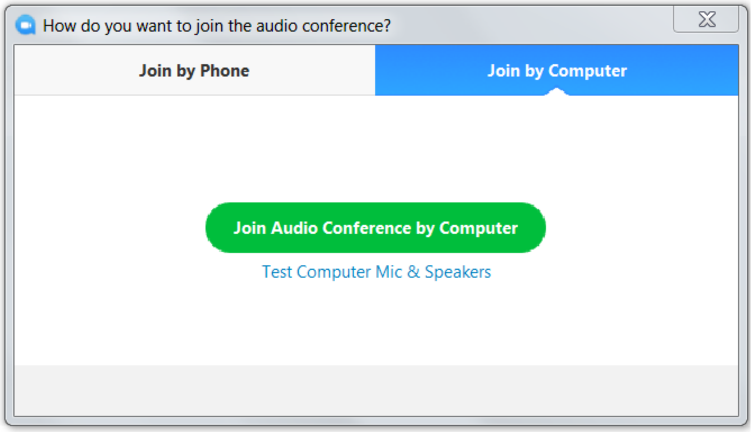
Note that Meeting Webinar will use your Meeting client for the webinar, so you will have access to many of the functions used in Meeting.

5.1 Connecting Your Audio

Note that Meeting Webinar will use your Meeting audio settings for your Webinar, so you will probably not need to change your audio settings. If you do need to change the setting or connection type, you can use the instructions in this section.

Although you can easily connect your computer audio to a meeting, we recommend that you use an audio headset connected to your PC.

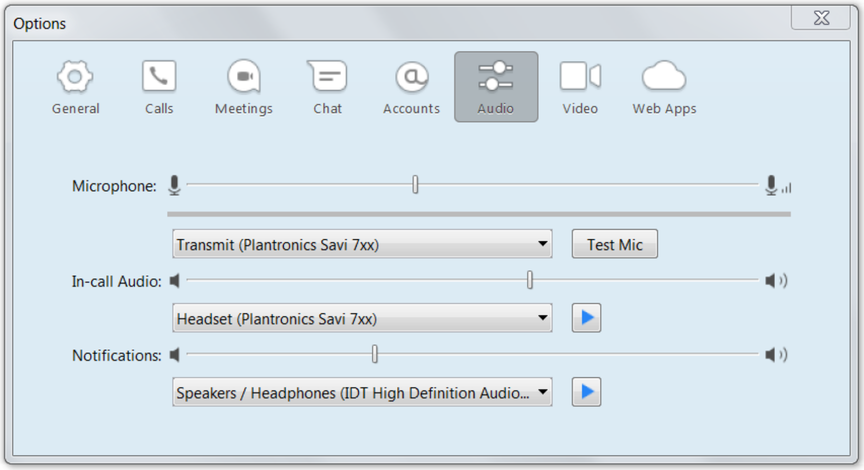
After joining or starting a meeting, click **Join Audio by Computer** to connect your computer's speaker and microphone to the Meeting.



If you prefer to use your computer's speaker and microphone, you can set Accession Desktop always to connect your audio automatically via your computer by going to **Tools -> Options -> Meetings** and selecting **Connect Audio when starting or joining**.

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

You can test your audio settings by going to **Tools -> Options -> Audio**.



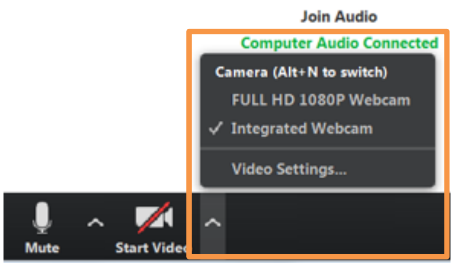
1. Use the dropdown list under **Microphone** to select the headset or device that you will use to transmit your voice.
2. Adjust the microphone volume using the sliding volume bar.
3. Use the **Test Mic** button to record a sample and play it back to check the quality of your headset microphone.
4. Use the dropdown list under In-Call Audio to select the headset or device that you will use to receive audio from your computer.
5. Adjust the headset/speaker volume using the sliding volume bar.
6. Verify your headset/speaker volume by pressing the play icon, which will play sound over your selected device.
7. Use the dropdown list under **Notifications** to select the device on which you will hear ringing and other Accession notification sounds. This should generally be your PC sound device, but can also be your headset.
8. Adjust the notification headset/speaker volume using the sliding volume bar.
9. Verify your notification headset/speaker volume by pressing the play icon, which will play sound over your selected device.

5.2 Connecting Your Video

Note that Meeting Webinar will use your Meeting video settings for your Webinar, so you will probably not need to change your video settings. If you do need to change the setting or camera used, you can use the instructions in this section. Meeting can support video up to 720p with a refresh rate of 30 frames per second.

You can configure your video settings in both Accession Desktop and directly from the Meeting Webinar application. These operate the same regardless of which method you use to access them.

- To access your video setting from the Meeting client, click on the **Video Setting**s icon

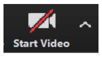


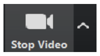
- To access your video setting from Accession Desktop, go to **Tool -> Options -> Video**.
- The video settings screen will appear. .

- Select the preferred video device to display a sample of your video

5.2.1 Sharing your Video in a Webinar

Note that only hosts and panelists can share video in a webinar.

- To share your video while in a Meeting Webinar, press the **Start Video** button  located at the lower left of your screen.

- To stop sharing your video simply press the **Stop Video**  button located in the same place as the Start Video button.

6 Webinar Controls

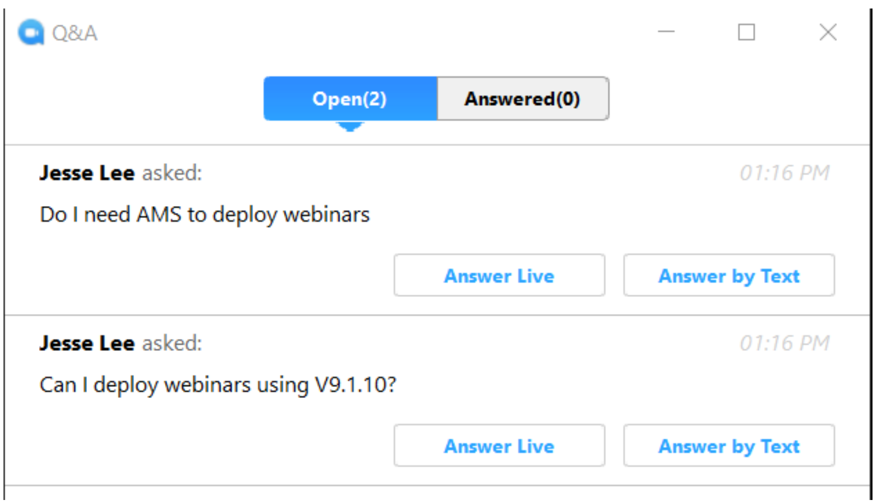
When you start your webinar, you will see the controls toolbar at the bottom of the screen that includes icons that launch the following features.

- 6.1, Q&A Panel
- 6.2, Polls

6.1 Q&A Panel

During your webinar, attendees can click on the toolbar at the foot of the webinar screen to launch the Q&A panel, where they can ask questions.

When attendees ask a question using the Q&A panel, only the hosts and panelists will see the questions on the following panel.



Webinar hosts and panelists can use this panel to answer any questions raised during the webinar:

- Select **Answer Live** to answer the question over live audio
- Select **Answer by Text** to type an answer.

Once you have answered a question, it is moved to the Answered tab.

You can obtain reports detailing Questions and Answers that were asked during the webinar.

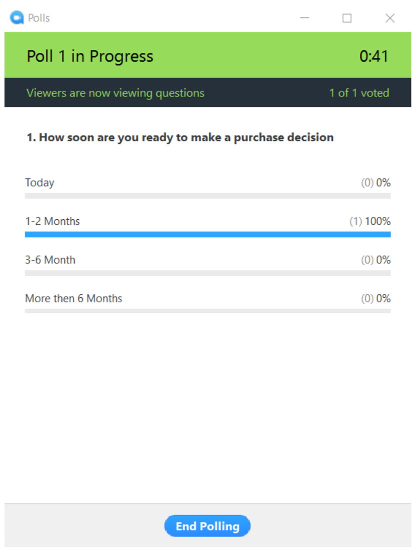
6.2 Polls

If you want to use polls in your webinar, you must create them in advance, as described in section 4.6. Webinar hosts and/or panelists can then launch these polls during the webinar.

To begin a poll during your webinar:

1. Click the  button on the webinar toolbar to launch the **Polls** panel.

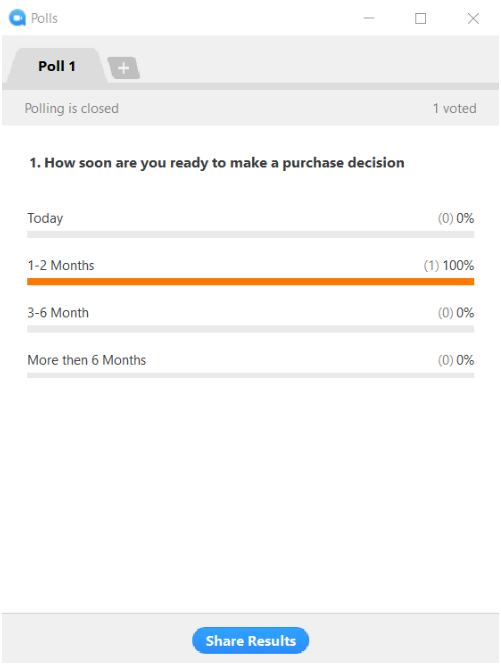
2. To begin polling, click the **Launch polling** button to display the following screen.



3. You will be able to see attendees responding to the poll in real time as well as view a timer for how long the poll has been active.

4. To stop the poll, click **End Polling**.

You will then see the poll results panel.



1. You can share the poll results with your Attendees by clicking **Share Results**.
2. To exit the results panel, click the x at the top right of the panel.

All poll results will be available in the webinar reports described in 7.5, Poll Report.

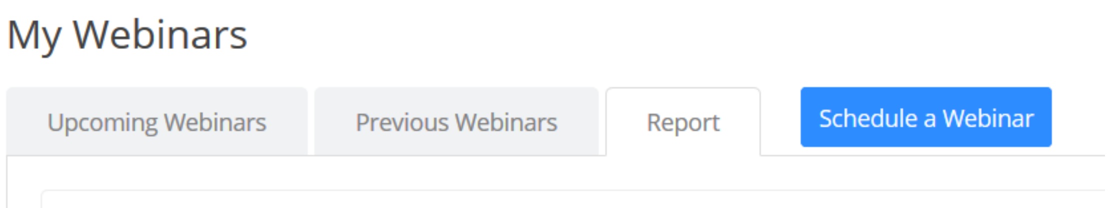
7 Webinar Reports

To allow you to make the most of your webinar, you can access reports for your Meeting Webinars. As of Q3 2020, the Registration Report has been generally rolled out for consumption. Other reports are currently in beta and will soon be released for general use.

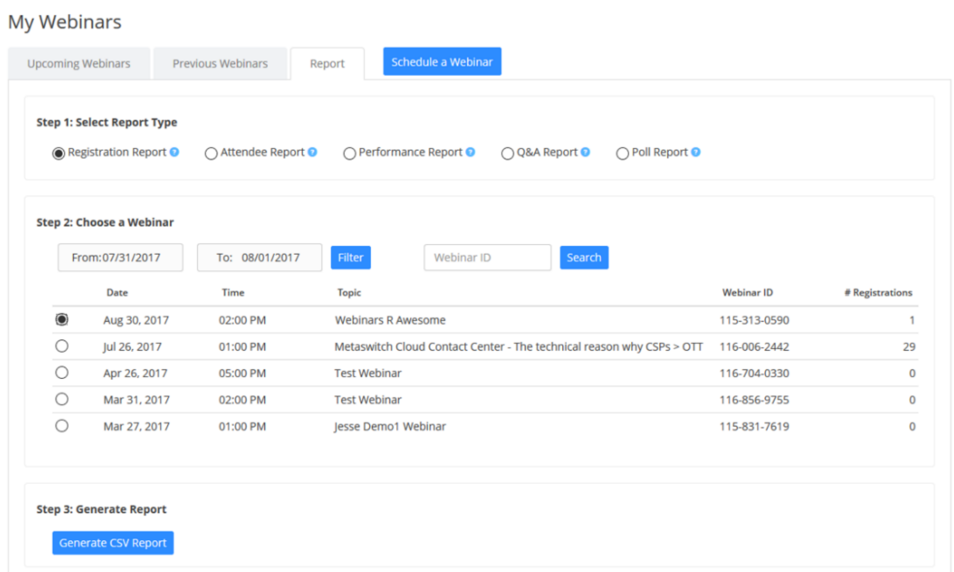
To access reports:

1. Go to the My Webinar page.

2. Select the Report tab.



3. You will then see the following screen, where you can use the radio buttons under Step 1 to select the report type and under Step 2 to choose the webinar, and then click on **Generate CSV Report** in Step 3 to create the report.



For more information on the different reports that are available, see the following sections.

- 7.1, Registration Report
- 7.2, Attendee Report
- 7.3, Performance Report

- 7.4, Q&A Report
- 7.5, Poll Report.

7.1 Registration Reports

To create a registration report for a webinar:

1. On the Report page, use the radio button under Step 1 to select the Registration Report Type.
2. Use the radio button under Step 2 to choose the webinar.
3. Click the **Generate CSV Report** button at the bottom of the screen.
4. This will create an Excel spreadsheet. When prompted, select **Open with Excel** if you want to view it immediately, or **Save File** to save it.
5. The report will contain details for each person who registered and each question captured during registration.

7.2 Attendee Report

To create a report of everyone that attended your webinar including hosts and panelists:

1. On the Report page, use the radio button under Step 1 to select the Attendee Report Type
2. Use the radio button under Step 2 to choose the webinar.
3. Click the **Generate CSV Report** button at the bottom of the screen.
4. This will create an Excel spreadsheet. When prompted, select **Open with Excel** if you want to view it immediately, or **Save File** to save it.
5. The report will contain information for each attendee including:
    - Actual webinar start time
    - Duration in minutes
    - Total number registered
    - Total number attended
    - Attendance rate
    - Number Q&A questions asked

7.3 Performance Report

The Performance Report provides information on the percentage of people that registered for the webinar compared to the actual attendees.

To create a report of everyone that attended your webinar including hosts and panelists:

1. On the Report page, use the radio button under Step 1 to select the Performance Report Type
2. Use the radio button under Step 2 to choose the webinar.
3. Click the **Generate CSV Report** button at the bottom of the screen.
4. This will create an Excel spreadsheet. When prompted, select **Open with Excel** if you want to view it immediately, or **Save File** to save it.
5. The report will contain information for each attendee including:
    - Time when entering the webinar
    - Time when leaving the webinar
    - Total time in webinar

7.4 Q&A Report

The Q&A Report provides a full list of questions asked and answers provided during the webinar.

To create a Q&A report:

1. On the Report page, use the radio button under Step 1 to select the Q&A Report Type.
2. Use the radio button under Step 2 to choose the webinar.
3. Click the **Generate CSV Report** button at the bottom of the screen.
4. This will create an Excel spreadsheet.   When prompted, select **Open with Excel** if you want to view it immediately, or **Save File** to save it.
5. The report will contain each question asked and the text answer as well as the asker's name and email address.

7.5 Poll Report

The poll report provides responses to any polls launched during your webinar.

To create a Poll report:

1. On the Report page, use the radio button under Step 1 to select the Q&A Report Type
2. Use the radio button under Step 2 to choose the webinar.
3. Click the **Generate CSV Report** button at the bottom of the screen.
4. This will create an Excel spreadsheet. When prompted, select **Open with Excel** if you want to view it immediately, or **Save File** to save it.
5. The report will provide each attendees responses for each poll launched during your webinar including:
   - Poll number
   - User Name
   - User Email
   - Poll Question
   - Poll Response