



OfficeSuite HD Meeting™ **User Manual**

WELCOME TO BROADVIEW NETWORKS' OFFICESUITE HD MEETING™. OUR SERVICE UNIFIES CLOUD VIDEO CONFERENCING, SIMPLE ONLINE MEETING AND MOBILE COLLABORATION INTO ONE EASY-TO-USE PLATFORM. OUR SOLUTION OFFERS THE BEST VIDEO AND WEB SCREEN-SHARING QUALITY ACROSS WINDOWS, MAC, IOS, AND ANDROID PLATFORMS.

Getting Started

You should have received an email that will confirm who you are by asking you to **Click here to activate your account**. You'll be asked to enter your account password, and type the new password a second time to confirm you typed it correctly. Click the **Go** button. Confirm your Name, Phone Number and Company information, and click the **option boxes** that you wish to activate followed by the **Save Changes** button on the Profile screen.

Note: Save this link to your favorites. This is the link you can use to update your profile at any time you wish.


OfficeSuite HD Meeting™ will automatically download a desktop application onto your computer. Depending on your browser, you may have to open the downloadable file on the bottom left of your web browser. Follow the on-screen prompts to complete the download if it doesn't download automatically.

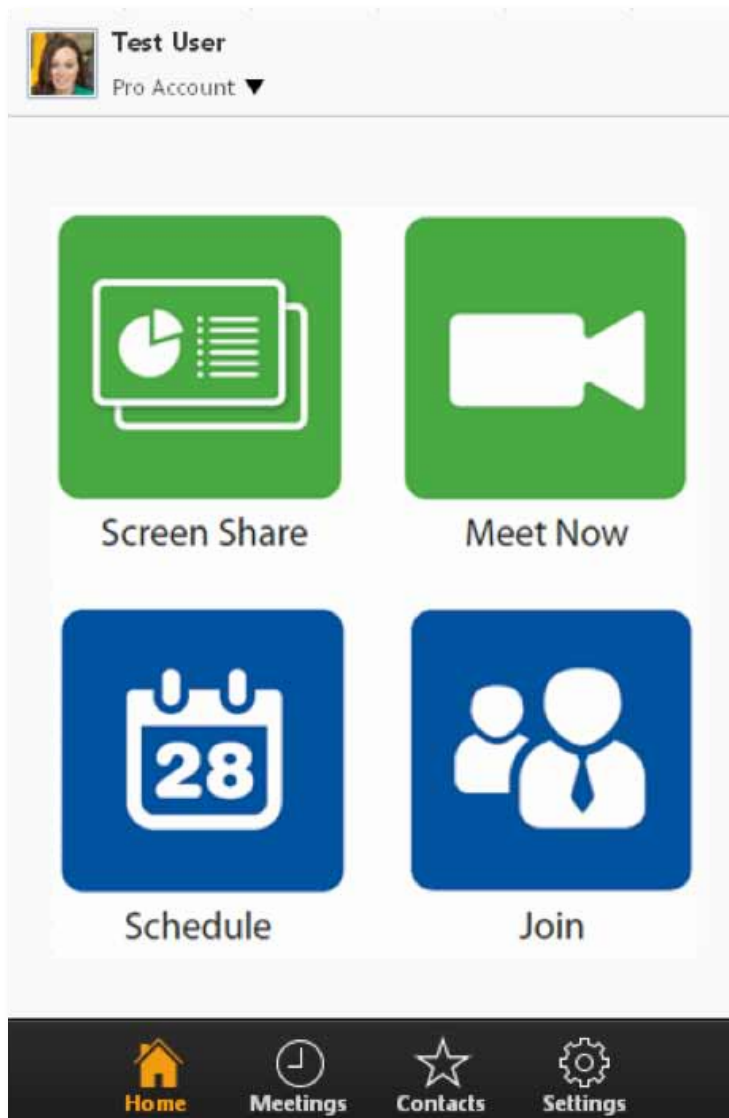
Desktop Application

You will see a new icon on your desktop (shown).



OfficeSuite HD Meeting

Double-click the  icon to open the main dialog box (shown). The default tab is **Home**.



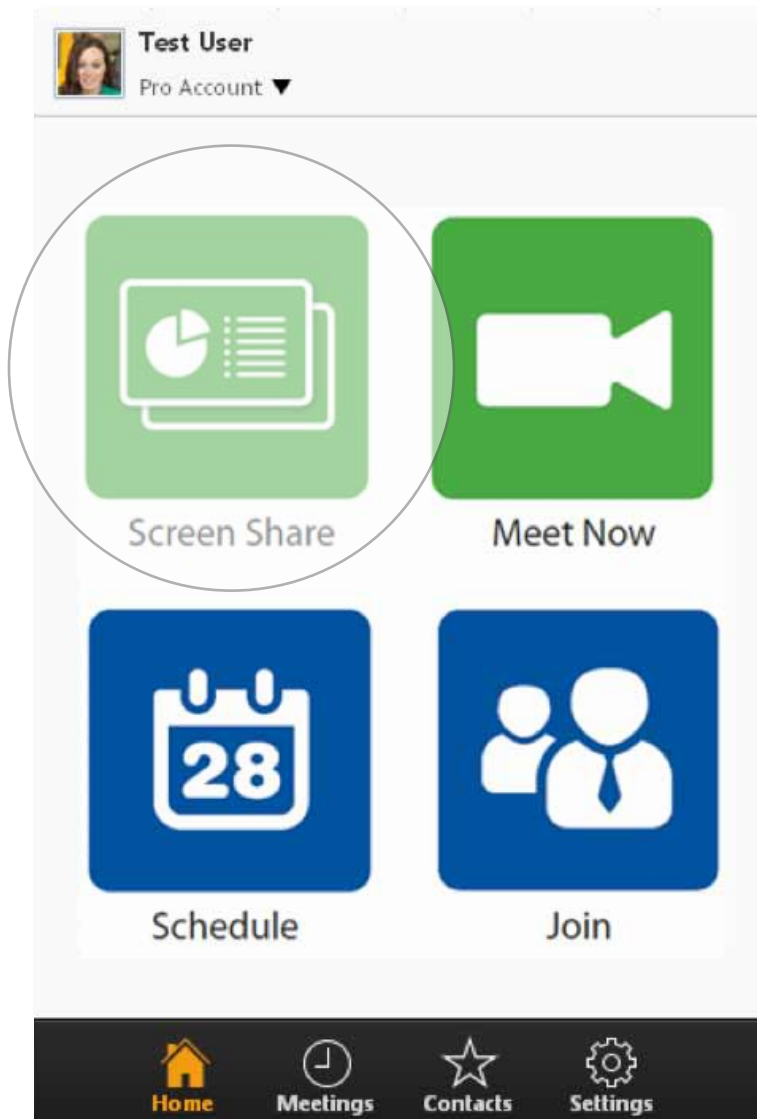
This dialog box allows you to:

- Click on **Screen Share Meeting** to start a meeting sharing your *desktop* or *application*.
- Click on **Video Meeting** to start a video meeting.
- Click on **Schedule Meeting** to set up a future meeting.
- Click on **Join a Meeting** to join a meeting that has already been started.

Note: Click on the account drop-down arrow to view your profile, check for updates, switch accounts, and log-out.

Starting a Screen Share Meeting

If you would like to start an instant meeting using screen share, you can do so by selecting the **Screen Share Meeting** icon on the Home tab screen.



A screen share meeting starts with screen sharing and audio (VoIP/computer audio or phone call-in). Video is not turned on automatically. After selecting **Screen Share Meeting** your meeting will start.

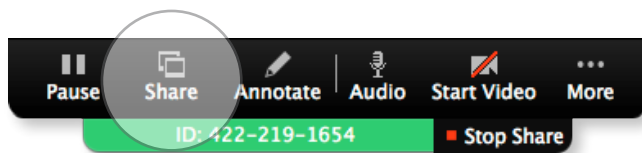
- You will first be prompted to select the window or desktop to share.
- Then, you will be prompted to invite other participant(s) to your screen share meeting.
- Video is not automatically turned on during the screen share meeting.

- During your screen sharing, any participant can start their screen sharing. There is no need to pass presenter functionality.
- Your screen sharing will stop when another participant shares their screen.

Note: You can prevent a participant from showing their screen by locking the screen share to only your screen.

SWITCHING WINDOWS DURING SCREEN SHARING

During screen sharing, you can switch between different windows or desktop by moving the cursor on your screen over the **Meeting Options Bar** at the top of your screen (as seen below). Click the **Share** menu option.



A new dialog box will appear showing the screens you currently have open (as show below).



Click the **Show all windows** link to expend the screen selection if you have more than 3 applications open.

Click on the screen you now want to share. By sharing your Desktop (either 1 or 2 if you have split screens) you can show anything you open or already have open on that screen.

Other options during screen sharing include:

- Mouse/ keyboard control
- Annotate
- Record

- Mute
- Chat
- Show participant list
- Open video
- Pause the screen sharing

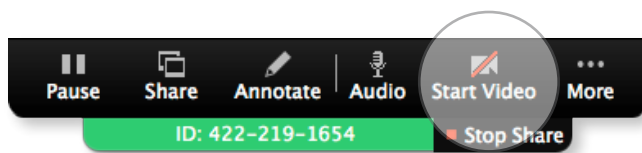
STOP SHARE

To end your screen share meeting, simply select **Stop Share** and then select **End Meeting for All**.

*Note: If you started your video screen share, when you click **Stop Share** your meeting will return to the **Video Meeting** mode.*

SWITCHING TO VIDEO MEETING

If you would like to add video during screen sharing click the **Start Video** menu option as seen below.



Video Layouts

There are 4 video layouts for single-monitor systems:

- Window View
- Full Screen View
- Gallery View
- Mini View

For Dual-monitor setup, you can view your screen share presentation on one monitor and the participant(s) video on the second monitor.

VIDEO LAYOUT DURING SCREEN SHARING

There are 3 layouts if you enabled video during screen-sharing:

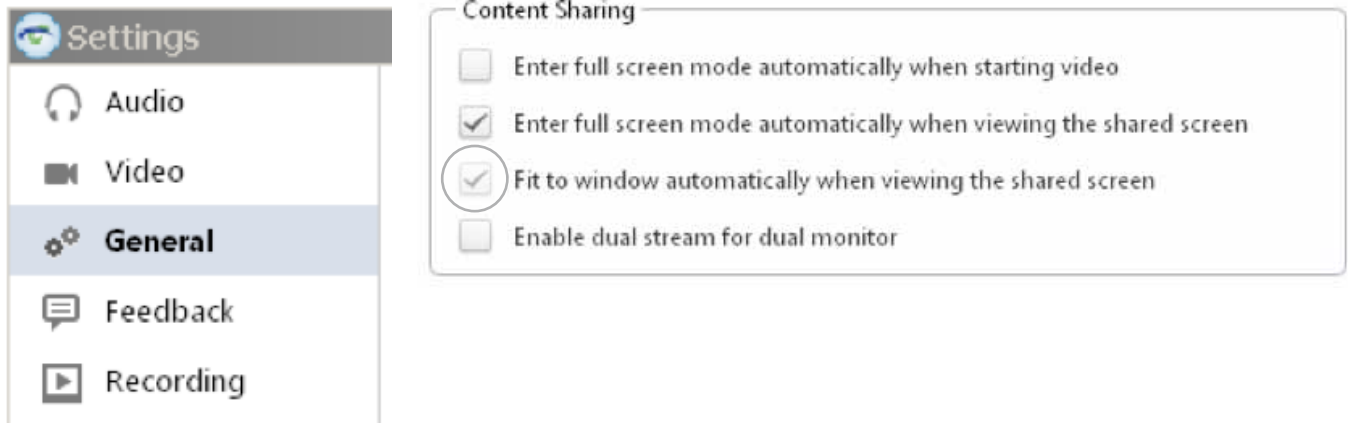
- **Minimized View** – shows who's talking via text only
- **Active Speaker View** – shows active speaker only
- **All Speaker View** – shows all speakers (4 at a time) with up and down scrolling

Note: You can move the window layout at any time.

FIT TO WINDOW

There is an option in Settings to **Fit to Window** as default.

Note: Fit to window can reduce the quality for the video on the screen. Original size will maintain the original quality.



You can also make this change when **Viewing** a shared screen/presentation.

Starting a Video Meeting

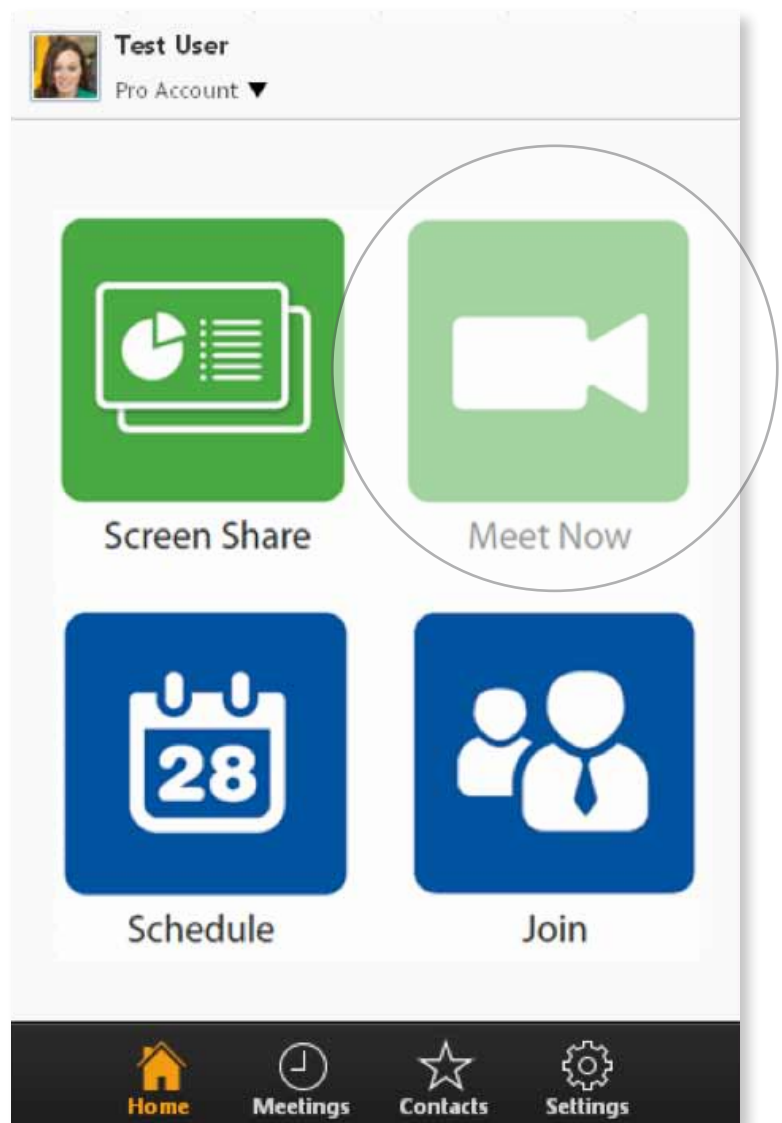
There are several ways to Host a Video Meeting. Listed below are 3 different ways to start that process:

I. Start a meeting via the web-portal

1. To host a video meeting, you can go to <http://meeting.broadviewnet.com> and click the Host a Meeting button.
2. You will be taken to the login page where you can enter the Email and Password that you have created for your account.
3. Then click on the Start Meeting button.

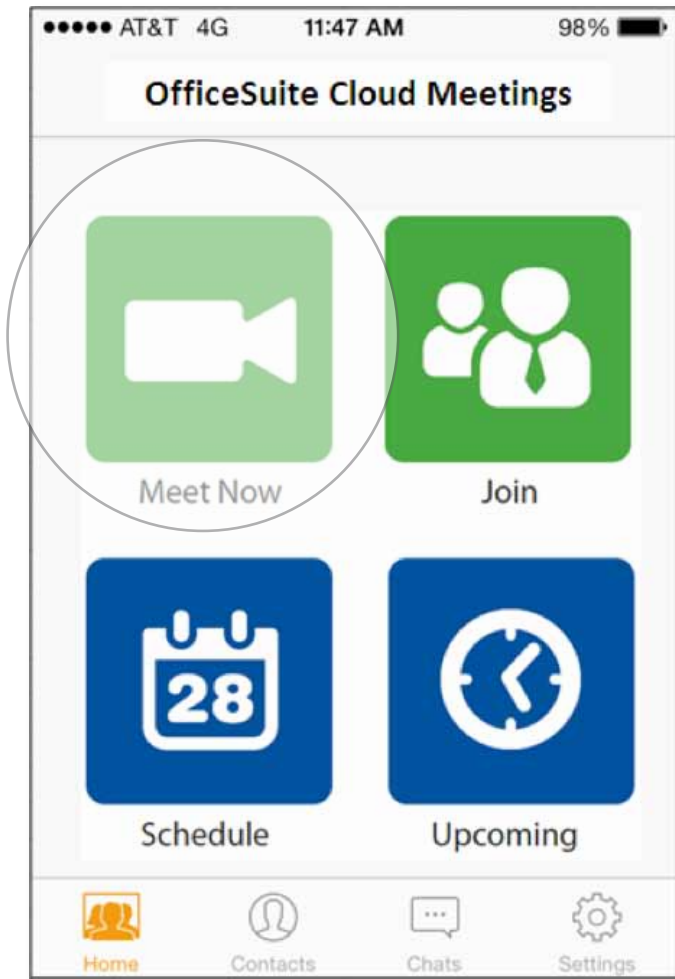
II. Start a meeting via your desktop application

1. On your desktop, click the OfficeSuite HD Meeting™ icon.
2. The OfficeSuite HD Meeting™ app will now open as shown below. Click the **Meet Now** icon to start your meeting.



III. Start a Meeting via your mobile app

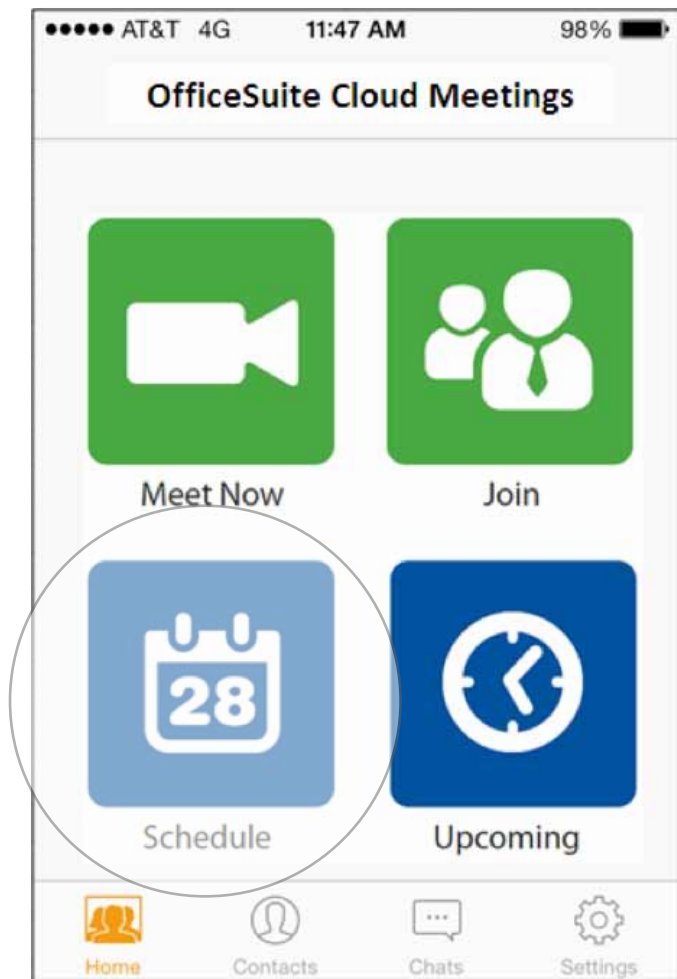
1. Access your mobile device. Find the OfficeSuite HD Meeting™ app on the device (If you don't have the app downloaded to your device, you can easily find the app in iTunes or GooglePlay by searching for OfficeSuite® and download the app for free).
2. Touch the app to open it. You will see the screen below.



3. Touch the **Meet Now** icon to start your meeting.

Schedule a Meeting

To schedule a meeting, first you must open your OfficeSuite HD Meeting™ application and log in. Then click the **Schedule** icon as shown below.



When you have opened the meeting scheduler, you can then start to setup your future OfficeSuite HD Meeting™ meetings.

Note: All scheduled meetings can be started by the host at anytime, regardless of the date and time settings.

The ***Schedule a Meeting*** screen (as shown) will open.

The screenshot shows a 'Schedule a Meeting' dialog box. At the top, the 'Topic' field contains 'Demo Meeting'. Below it, the 'When' section includes a 'Start' date and time picker set to 'Tue March 18, 2014' at '11:00 AM', a 'Duration' of '1 Hr 0 Min', and a 'TimeZone' dropdown set to '(GMT-4:00)Eastern Daylight Time'. There is an unchecked checkbox for 'Recurring meeting'. The 'Meeting Type' section has two radio buttons: 'Screen Share Meeting (Video does not start automatically)' which is selected, and 'Video Meeting (Video starts automatically)'. The 'Meeting Option' section has two unchecked checkboxes: 'Require meeting password' (with an adjacent text input field) and 'Enable join before host'. The 'Calendar' section has three radio buttons: 'Outlook' (selected), 'Google Calendar', and 'Other Calendars'. A blue 'Schedule' button is located at the bottom right of the form.

- **Topic:** Choose a topic/name for your meeting.
- **When:** Select a date and time for your meeting. If you want a recurring meeting, check the box.
- **TimeZone:** By default, OfficeSuite HD Meeting™ will use Eastern Daylight Time. Change this if you are in another time zone.
- **Meeting Type:** Select which meeting type you would like to start the meeting.
 1. Screen Share Meeting
 2. Video Meeting

MEETING OPTION

- If you want to have participants enter the meeting via a password, enter the desired password in the space provided.
- If you want an open forum to start before you open the meeting, check the ***Enable join before host*** box.

Note: The meeting will end after 40 minutes if the host doesn't join.

Calendar: Add to any selected calendar and send out invites to participants.

Click the **Schedule** button to finish and open up whichever calendar you have selected.

*Note: Choosing **Other Calendars** will allow you to copy and paste the scheduled meeting information such as date, time, and meeting URL into the Email that you may send to invitees.*

Depending on the Calendar option you have chosen, a meeting invite will open for that application. Within the body of the meeting invite, the OfficeSuite HD Meeting™ information to access your newly scheduled meeting is automatically populated. Simply add invitees to the meeting invite and send at the date and time you have designated.

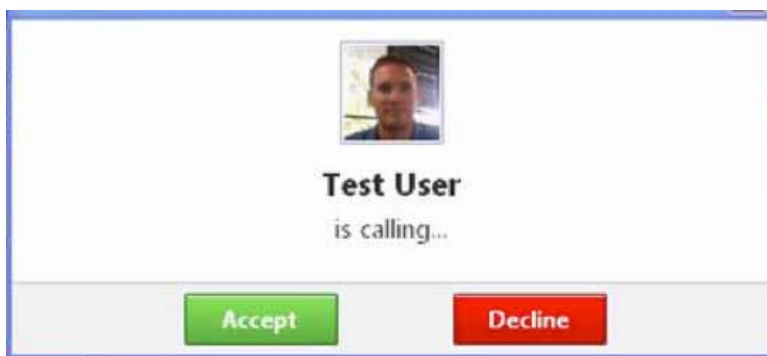
Note: Non-recurring meeting ID's will expire 30 days after the meeting is started. You can re-start the same meeting ID as many times as you would like, within the 30 day window.

Note: Recurring meeting ID will expire 365 days after the meeting is started on the first occurrence. You can re-use the meeting ID for future occurrences within the 365 day window.

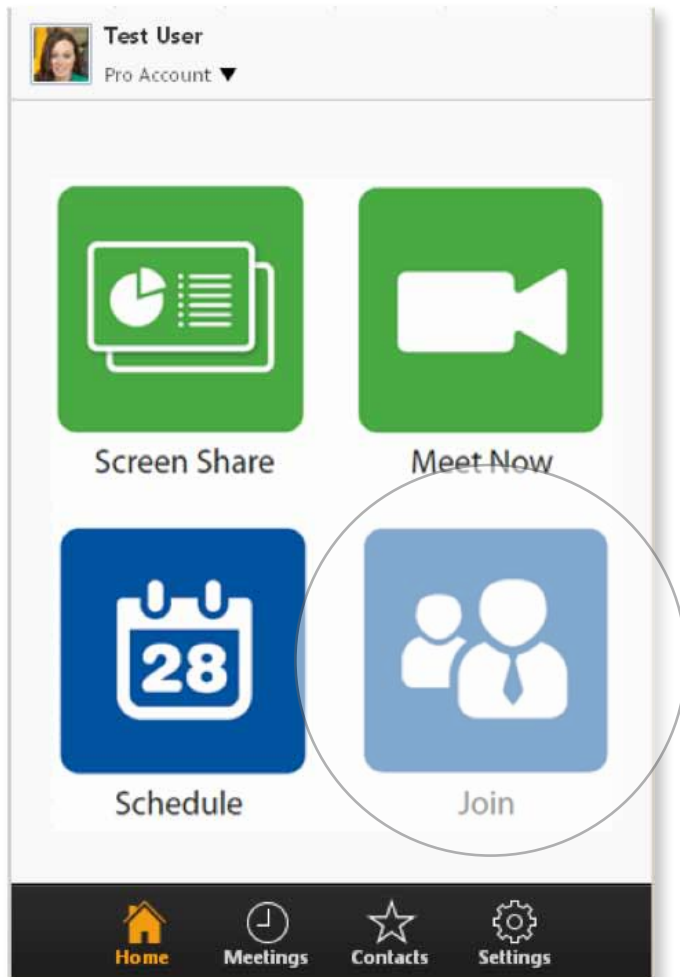
Join a Meeting

There are many ways to join a meeting.

1. Join by answering a video meeting. Just like answering a phone call, simply Accept the call. You can also Decline if you're unable to join. See the image below to view this screen.



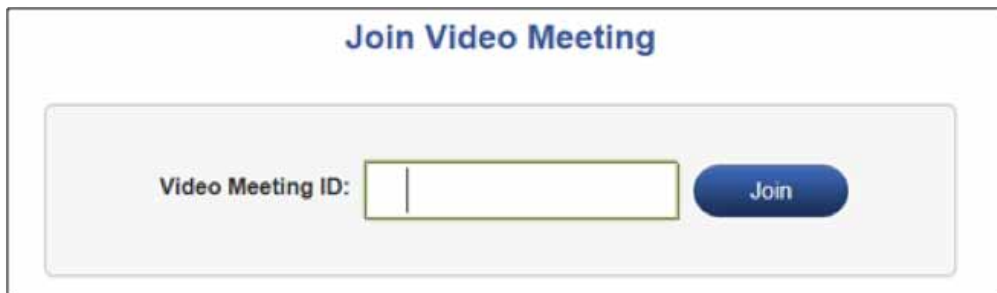
2. Join via your desktop application.



After clicking the Join icon as shown above, a new window will open. Enter the meeting ID of the scheduled meeting you are trying to join in the space provided, followed by your name and click the Join button as shown on the screen below.

A screenshot of a web form for joining a meeting. The form has a light grey background. At the top, it says 'Please enter your meeting ID and your name.' Below this are two input fields. The first is labeled 'Meeting ID:' and is empty. The second is labeled 'Your Name:' and contains the text 'Test User'. At the bottom right of the form is a grey button with the text 'Join'.

3. Join via URL link in meeting invite. Each meeting invite comes with a link that allows participants to join simply by clicking on it. Participants will be taken right into the meeting without a need to enter the meeting ID first. Users may be asked for their name if that's required by the host as a way to identify everyone on the call.
4. Join via IM Chat. The meeting invite link can also be applied to a chat session. A participant can click on the link to open the meeting from the Chat application.
5. Join via the <http://meeting.broadviewnet.com> webpage. Click on the Join a Meeting button. Enter your Video Meeting ID to join as shown below.

A screenshot of a web form titled "Join Video Meeting" in blue text. Below the title is a light gray rectangular box containing a "Video Meeting ID:" label, a text input field with a vertical cursor, and a blue "Join" button.

6. Join using Dial-in from your phone. You can join a meeting via teleconferencing by using your landline or mobile device by dialing the number provided in the invitation you received. You will be asked to enter the meeting ID.

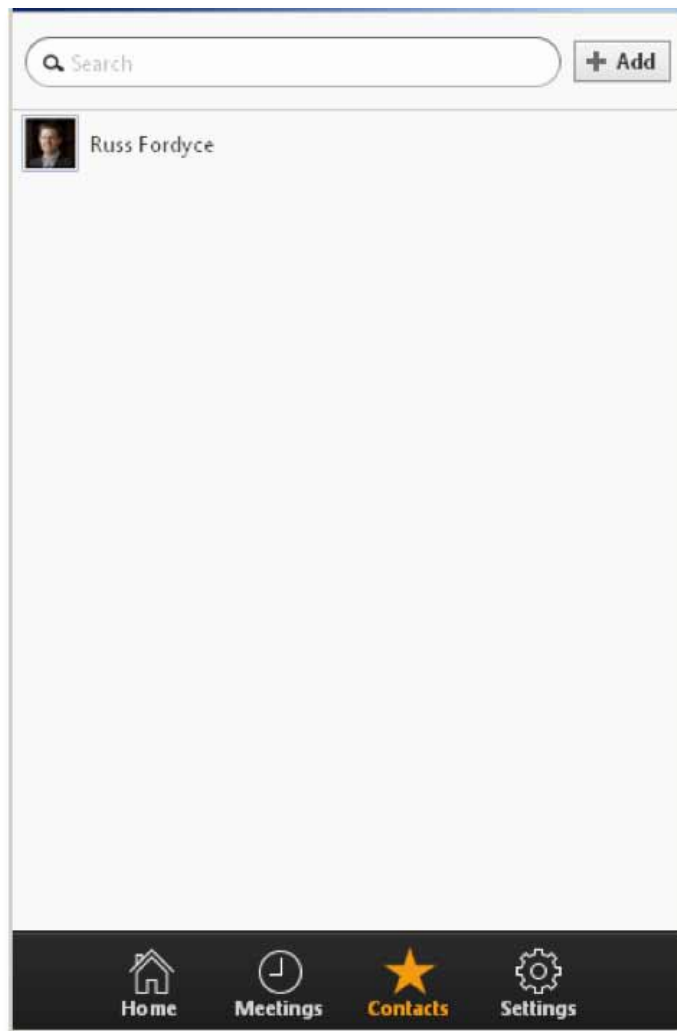
Note: If you are already in the meeting via a computer for the screen share/video portion, you will also be asked to enter your 2-digit participant ID number so that your access to the meeting is synchronized. If you do not enter via computer and don't know your participant ID, do not enter anything on your phone and you'll be placed into the call as a Caller only.

Inviting Others to Join Your Meeting

There are many ways to invite participants onto your hosted calls.

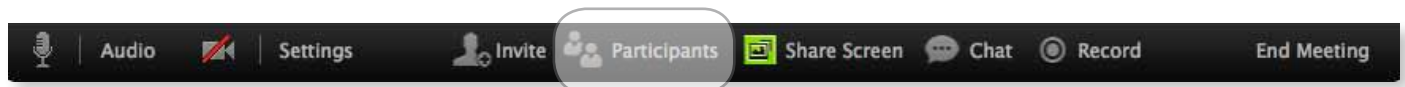
1. Schedule an invite via your desktop application. Open your desktop application and click the Schedule icon. After you finish setting up your meeting, the calendar you choose will open with your pre-populated meeting information in the body. As you would normally add invitees to your meeting requests, simply add anyone you want to invite to this scheduled meeting and send the invite.

2. Select others from the contacts you create in the desktop application.
Open the desktop application and click the Contacts tab as shown below.



Note: A green dot (for Google and Facebook only) means that the person is currently online. The invitees do not need to have OfficeSuite HD Meeting™ pre-installed to join your meeting.

3. Invite contacts while in an OfficeSuite HD Meeting™ by selecting the **invite** tab in your in-meeting toolbar as shown below.

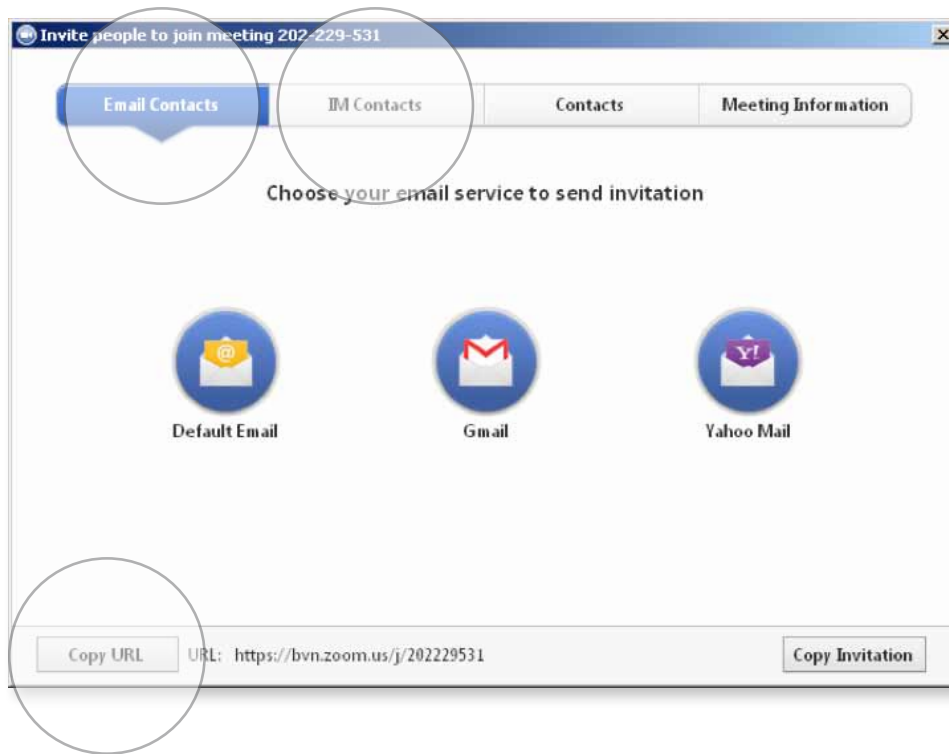


FROM HERE, YOU CAN:

- Invite using your Default, Google, or Yahoo Email Contacts.
- Invite using your Favorites, Google, or Facebook IM Contacts.

- You can **Copy URL** or **Copy Invitation** and paste it anywhere for your contacts to click on and join the meeting.

See the screen below for these details.



Scheduled Meetings

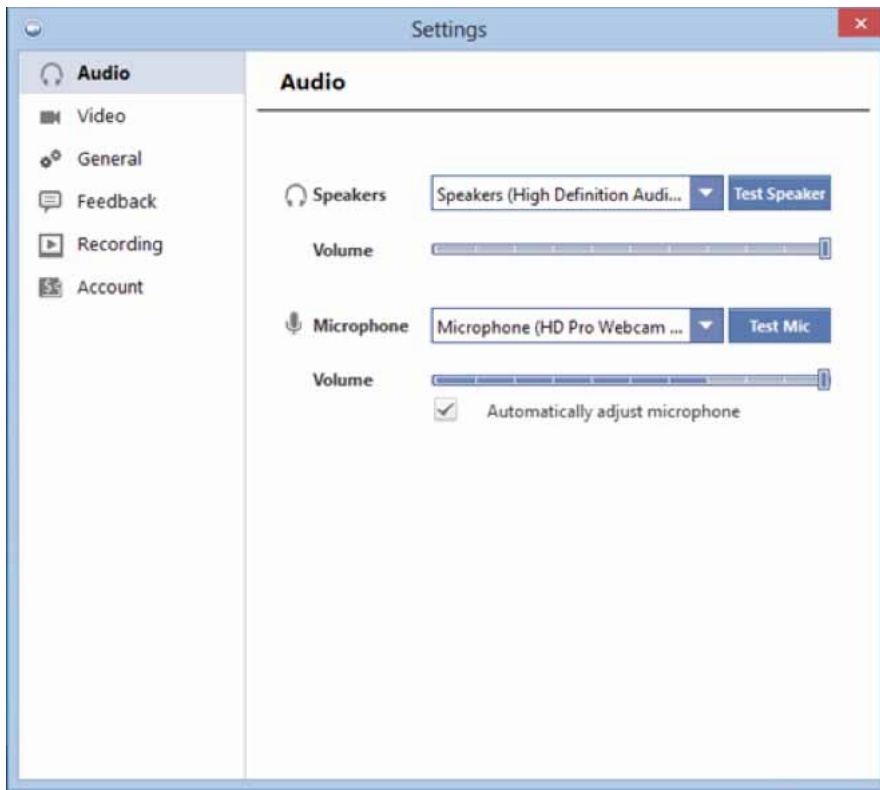
Select the **Meetings** tab to view, start, edit, or delete your personal meeting ID, scheduled meetings, and recorded meetings.

- **Start:** Select start to begin the pre-scheduled meeting that you have listed in your upcoming meetings.
- **Edit:** You can edit or update your scheduled meeting.
- **Delete:** Selecting delete will permanently delete your scheduled meeting.
- **Copy URL:** You can copy your scheduled meeting(s) URL and manually paste into an email, IM, SMS, etc.

*Note: If you do not see your scheduled meeting, click the **refresh** tab in the upper right-hand corner to update/refresh the meeting list.*

Settings

You can find the **Settings** tab in the main dialog box or in the in-meeting menu bar. After clicking on **Settings**, you will have the following options:



- **Audio:** You can test, select and adjust your speakers and microphone in the audio section. We suggest that you do this prior to your meeting for the best meeting experience.
- **Video:** You can test and select your video camera for the best HD experience based on the video cameras available to you.
- **General:** You can select additional preferences.
- **Feedback:** We welcome any suggestions, questions, comments, or feedback that you may have on making this product even better.
- **Recording:** You can browse or open your stored recordings (all recordings are stored on your local device/computer).

What You Can Do In a Meeting

When you have started or joined a meeting, you can perform the following actions from the menu bar located at the bottom of the meeting window (move your mouse to toggle):

- Invite more people to join by Email, IN, SMS (mobile users) or via meeting ID (link)
- Screen share your desktop or specific application window
- Start a group or private chat
- Record your meeting
- Manage participants
- Mute and Un-mute your audio
- Select audio connect to dial-in via phone and disconnect computer audio
- Stop and start your video
- Configure your Settings
- Leave or end the meeting

SCREEN SHARING AND ANNOTATIONS

To start the screen sharing click the **Share Screen** button located in your in-meeting toolbar.

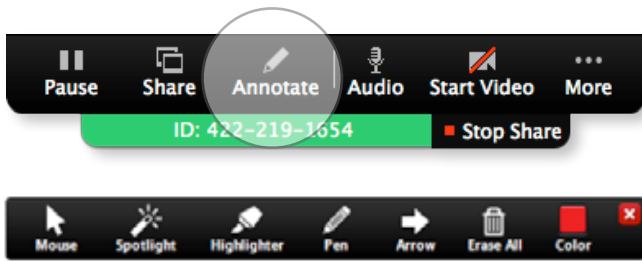


After selecting **Share Screen**, you can choose to share your desktop or an individual application/window open on your computer.

Note: You can select to share computer audio when sharing a video clip such as a YouTube or locally stored video clip.

Note: If using dual monitor set-up, you can show the screen sharing on one monitor and the participants on the second monitor.

During your screen share you will have the option of using several features. By selecting the Annotate button (shown below) on the top menu bar you can perform the following tasks:



- Select Mouse (set as default)
- Select Spotlight to show something on the screen with special attention
- Select Highlight to highlight anything on the screen with the color indicated
- Select Pen to write on the screen with the color indicated
- Select arrow to click and drop arrows on the screen where you want to call attention
- Select Erase All to erase all annotations made to that point
- Select Color to change the color of the writing and arrow annotation items

AUDIO, VIDEO AND MORE

- The Audio option allows you to connect via phone, and disconnect the computer audio
- The Video option turns video on or off depending on how you started the meeting (Screen Share mode or Video mode).
- The More option gives you added features including:
 1. Participants – gives you a list of participants in the meeting at that time
 2. Chat – gives you the ability to chat with someone in the meeting
 3. Start Recording – gives you the ability to record the meeting
 4. Invite – gives you the ability to invite more people
 5. Hide/Show Video Panel – allows you to either hide or show the video panel depending on your preference, and if Video is on
 6. Settings – gives you access to your meeting settings

7. End Meeting – allows you to not only stop sharing, but will also give you an option to close the meeting for all

Record a Meeting

To record a meeting, you need to either be the host or the host must grant you permission to record.

While you are in an OfficeSuite HD Meeting™, move your mouse around the screen to toggle the menu bar (Depending on the mode you're in, the toolbar will be the top or bottom of the screen).

1. Select the Record button in the "More" tab of the upper toolbar. The Record button is located by itself on the lower screen toolbar.
2. Optional – Click on a participant to allow them to record.
3. All participants in the meeting will see a recording indicator in the upper-left corner of the screen as shown below.



4. When the meeting ends, recording will automatically stop, or you can stop the recording prior to the meeting ending.

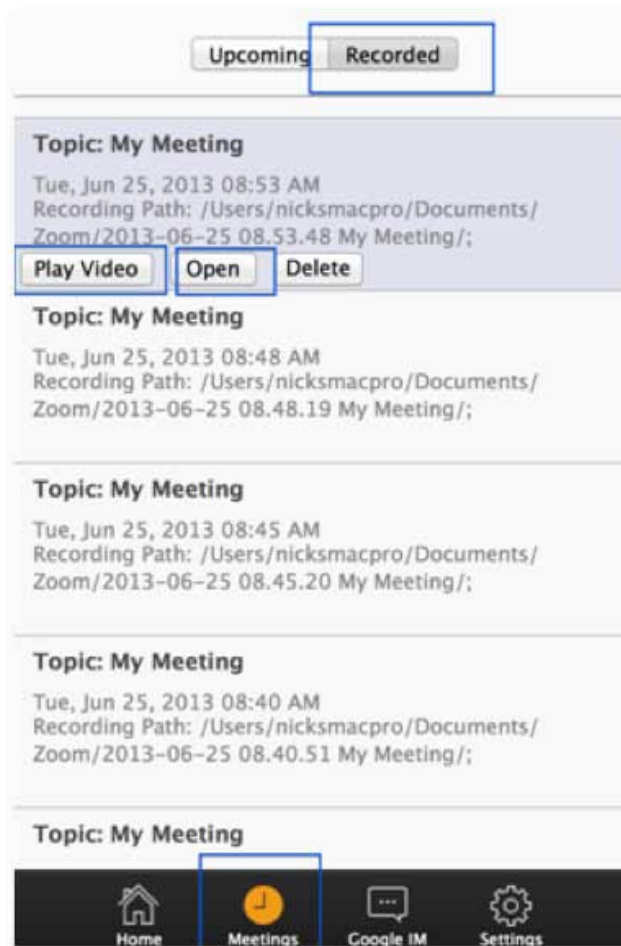
WHAT YOU CAN RECORD

You can record the active speaker, content sharing with active video panel and M4A audio.



SAVED RECORDING FILES

To access your saved recorded meetings, open your desktop application. Then select **Meetings**, and on the top part of window select the Recorded tab as shown below.



All recorded meetings are stored locally on your device or computer.

Note: Your recorded meeting will be converted and added after you have ended the meeting that you were currently recording.

WHAT CAN I DO WITH MY SAVED RECORDING?

Using you mouse, toggle over your saved recording to view your options.

- **Play video:** Selecting **Play** from your desktop application will play the saved meeting with your default media player.
- **Open:** Selecting **Open** will allow you to view your saved file in your device or computer's folder.
- **Delete:** After deleting your saved recorded meeting, it will still be saved to your local device or computer.

RECORDING FORMATS

After you have ended your meeting, your recorded file will be converted and saved to your local device/computer. You will have four (4) different file types to choose from.

- **M3U playlist:** A playlist to play the individual MP4 files – Windows only
- **MP4 file:** Video file or split video and screen sharing files – Windows and Mac
- **M4A file:** A single audio only file
- **VLC player (MP4) file:** A single file for video and screen sharing view via VLC Player – Windows
- **MP4 file:** A single file for video and screen sharing – Mac Only

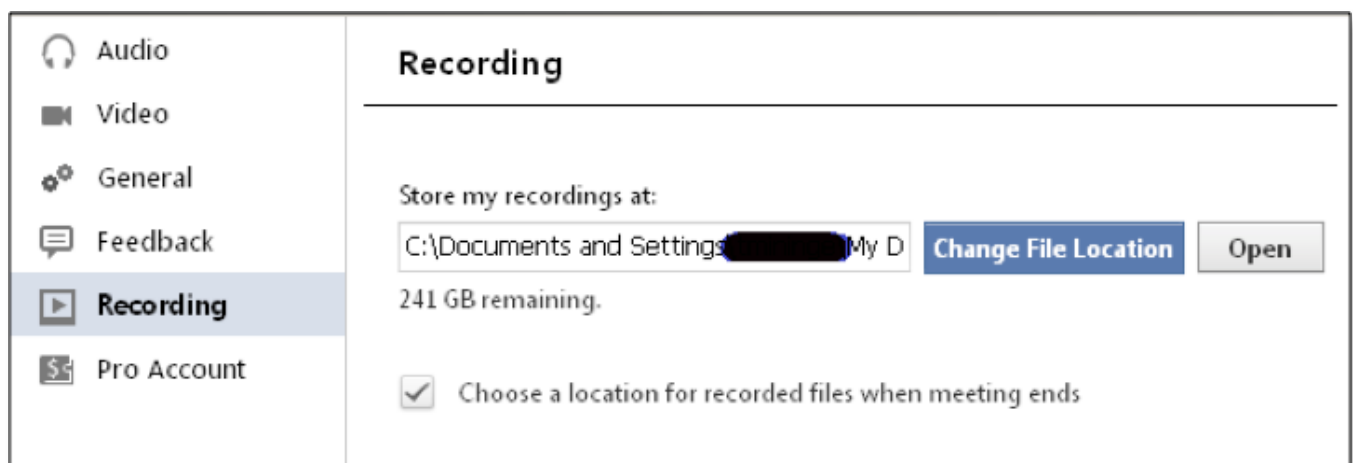
Note: The VLC Player(MP4) file and single MP4 (Mac) file can also be opened by Quicktime player. You can convert the file to .MOV and edit using iMovie.

CHANGE THE LOCATION OF STORED RECORDINGS

You can change the location of where your recorded meeting file is stored on your computer.

Open the desktop application and click the **Settings** button. On the left menu, click the **Recording** option. From here you can:

- Change where your recorded file will be stored.
- Select an option to pop up a location selection each time a recorded meeting ends.



Join By Teleconferencing

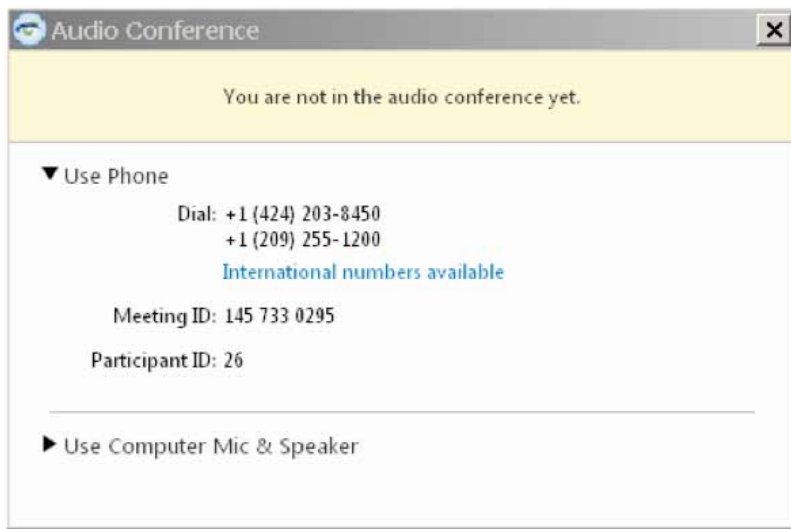
You can join an OfficeSuite HD Meeting™ via teleconferencing/audio conferencing using a traditional dial-up phone. This is useful in occasions where:

- You don't have a microphone or speaker on your PC/Mac
- You don't have a smartphone (iOS or Android) while on the road
- You could not connect to a network for video and VoIP/computer audio

JOINING BY TELECONFERENCING

Join by computer for video and phone for audio.

- Join an OfficeSuite HD Meeting™ at <https://meeting.broadviewnet.com> and enter your 9 or 10 digit meeting ID.
- When you are in the meeting, select the **Audio** option in the menu bar.
- Follow the instructions in the dialog box to **Use Telephone** as shown below.



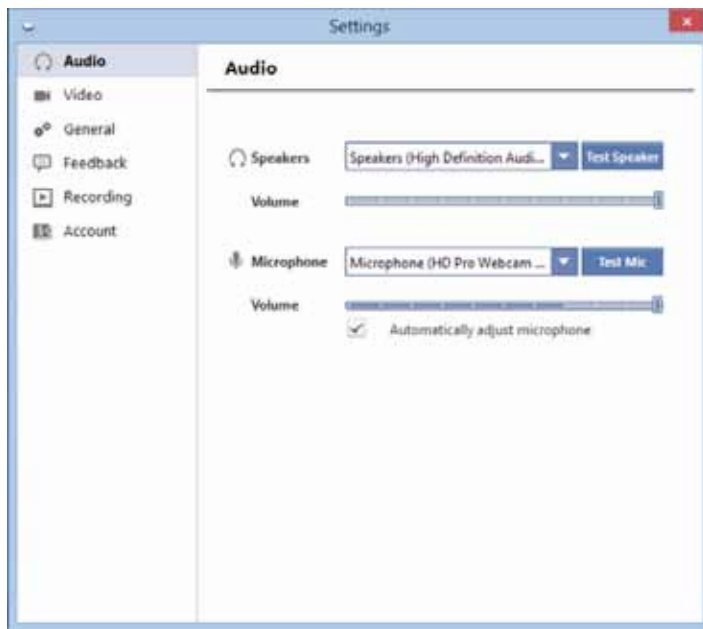
About Settings

In the OfficeSuite HD Meeting™ desktop application you will have a **Settings** option. Under Settings, you will have the following options:

Note: You can also access these settings in your in-meeting toolbar during an OfficeSuite HD Meeting™.

- **Audio:** You can test, select and adjust your speakers and microphone in the audio section. We suggest that you do this prior to your meeting for the best meeting experience.
- **Video:** You can test and select your video camera for the best HD experience based on the video cameras available to you.
- **General:** You can select additional preferences.

- **Feedback:** We welcome any suggestions, questions, comments, or feedback that you may have on making this product even better.
- **Recording:** You can browse or open your stored recordings (all recordings are stored on your local device/computer).
- **Account:** You can see what version of the software you currently have. You can also upgrade or manage your account details.



Getting Started With IOS and Android

OfficeSuite HD Meeting™ works on your iPhone®, iPad®, or any other iOS device and Android™ devices. You can download the OfficeSuite HD Meeting™ app from the Apple App Store or GooglePlay. Simply type OfficeSuite® in the search option and select the **conferencing app**.

When you have the OfficeSuite HD Meeting™ app installed, tap the **OfficeSuite HD Meeting™** application icon on your mobile device to open the meeting controls. In the meeting controls, you can enable **Contacts**. Enabling contacts will allow you to invite family, friends and colleagues that already exist in your contacts list.

Note: Adding contacts to your OfficeSuite HD Meeting™ app will allow you to invite others quickly into an OfficeSuite HD Meeting™ and send one-on-one or group messages.

Click the **Contacts** button on the bottom of the screen. Then, enter your number in the Phone number field as seen below.

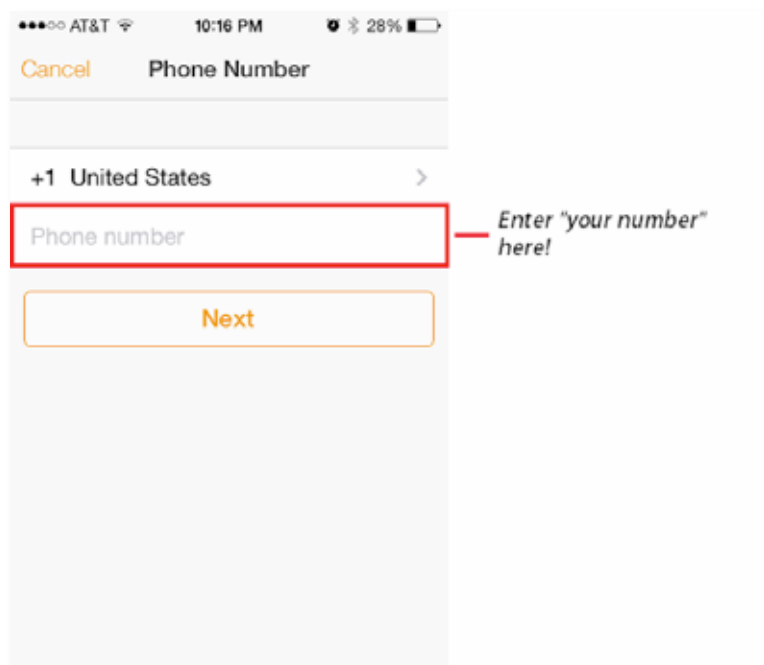
OfficeSuite HD Meeting™ will send you a message with your verification code that you can then enter to verify your phone. Now you're ready to start inviting your contacts. Select **Invite** to choose which contacts you would like to add.

You can also select **Chat** and choose someone you would like to send IM messages to.

MEET NOW, JOIN, SCHEDULE, UPCOMING MEETINGS

- **Meet Now:** Will allow you to start an instant meeting and invite up to 25 participants.
- **Join:** Will allow you to enter a 9-digit meeting ID and instantly join another host's meeting.
- **Schedule:** Will allow you to set up a future OfficeSuite HD Meeting™.
- **Upcoming Meetings:** View all of your future scheduled meetings.

Note: If you don't link your account, your meeting(s) will be timed via our free trial account offer, and each meeting will end after 40 minutes. You will get a warning after 30 minutes that only 10



minutes remain before your meeting will end.

LINK YOUR ACCOUNT LOGIN

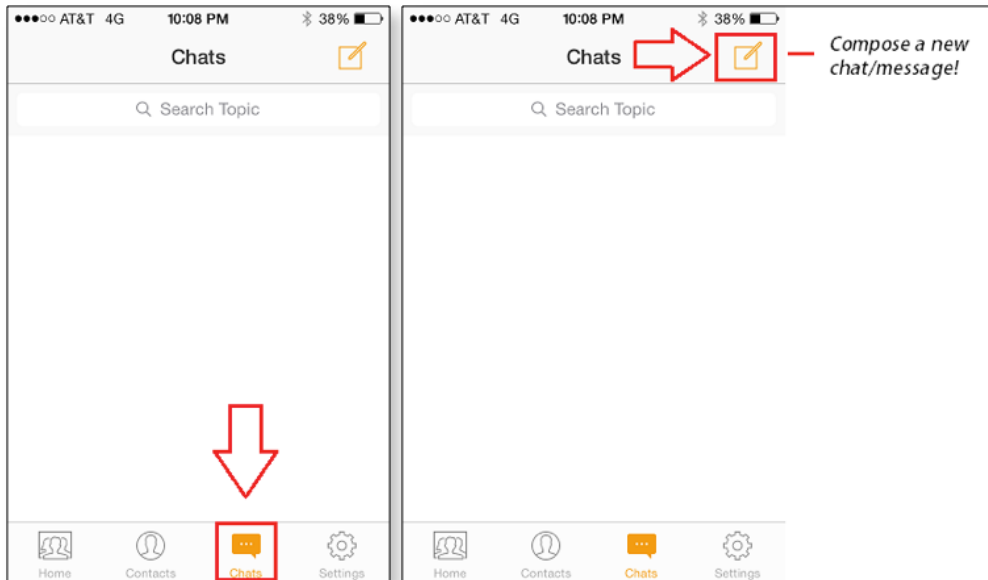
You can Link your OfficeSuite HD Meeting™, Google or Facebook account by selecting the **Settings** icon and then choosing **Link Account**.

To logout, simply select **unlink account**.

By linking your account, you will also be able to view any upcoming meetings you have

associated with your account.

*Note: Linking your account will also allow you to find more contacts and use features like **Personal Meeting ID**.*



SETTINGS

When you've completed linking your account, you can access more OfficeSuite HD Meeting™ features and settings for your mobile device.

In "**Settings**" you can:

- Add a profile picture and choose a screen name
- View your Linked account
- View your personal 10-digit meeting ID
- See what version of OfficeSuite HD Meeting™ you're using
- Send us feedback
- Spread the word about OfficeSuite®
- Add already existing contacts from your mobile device
- Receive pop-up notifications from IM messages
- Enable/Disable **Safe Driving Mode**
- Connect OfficeSuite HD Meeting™ to another computer/device using **Airplay!**

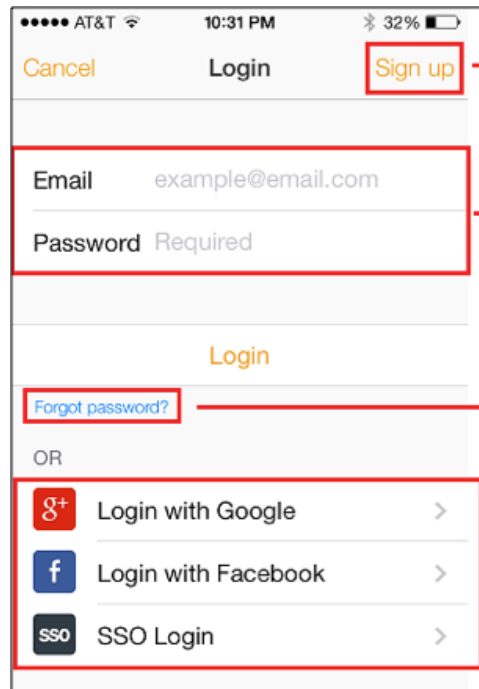
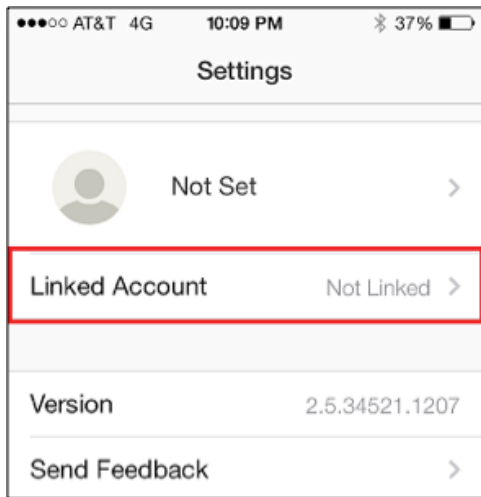
Note: Your screen name will show as your name in your OfficeSuite HD Meeting™ application.

Personal Meeting ID (PMI)

Personal Meeting ID (PMI) is assigned to you automatically as a permanent virtual room. You can start it at anytime or schedule it for a future use.

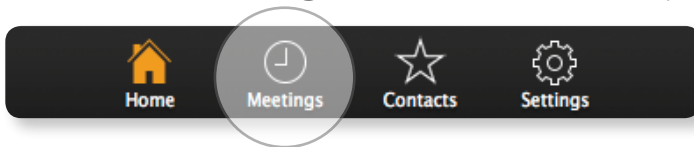
Your Personal Meeting ID becomes your Personal Meeting URL, eg:

<https://meeting.broadviewnet.com/j/5551112222>

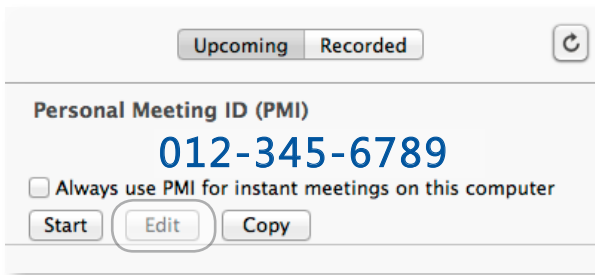


If you are on a Paid plan, you can customize the 10 digit ID. For example, you can make the ID your phone number. Follow these steps to customize:

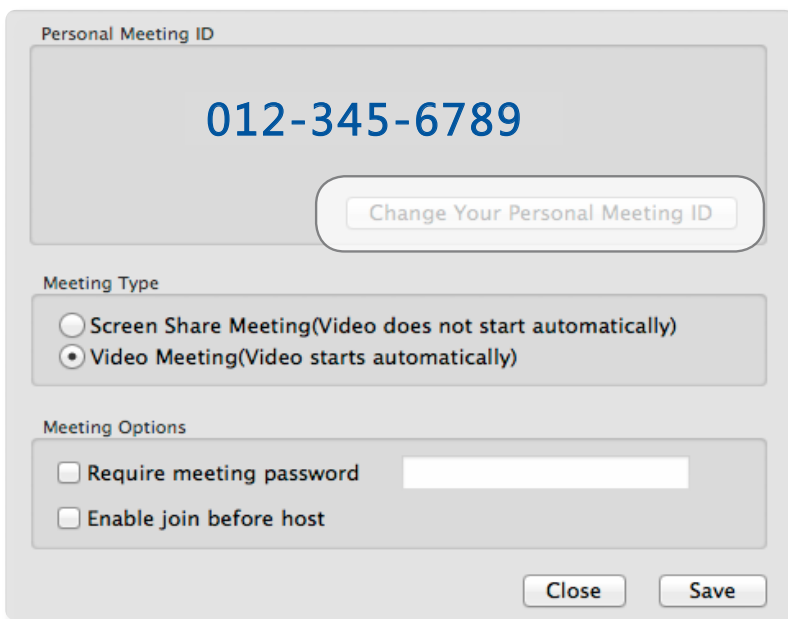
1. Open your OfficeSuite HD Meeting™ desktop application or mobile app. Click on the **Meetings** button on the Home page as shown below.



2. Then click the **edit** button as shown below.



3. Then click **Change your Personal Meeting ID** as shown below.



4. Click **Copy** to copy your Personal Meeting URL to paste into Email/SMS/IM invitation, etc. as shown below.

