



Remote working

Video conferencing and online business meetings step after step

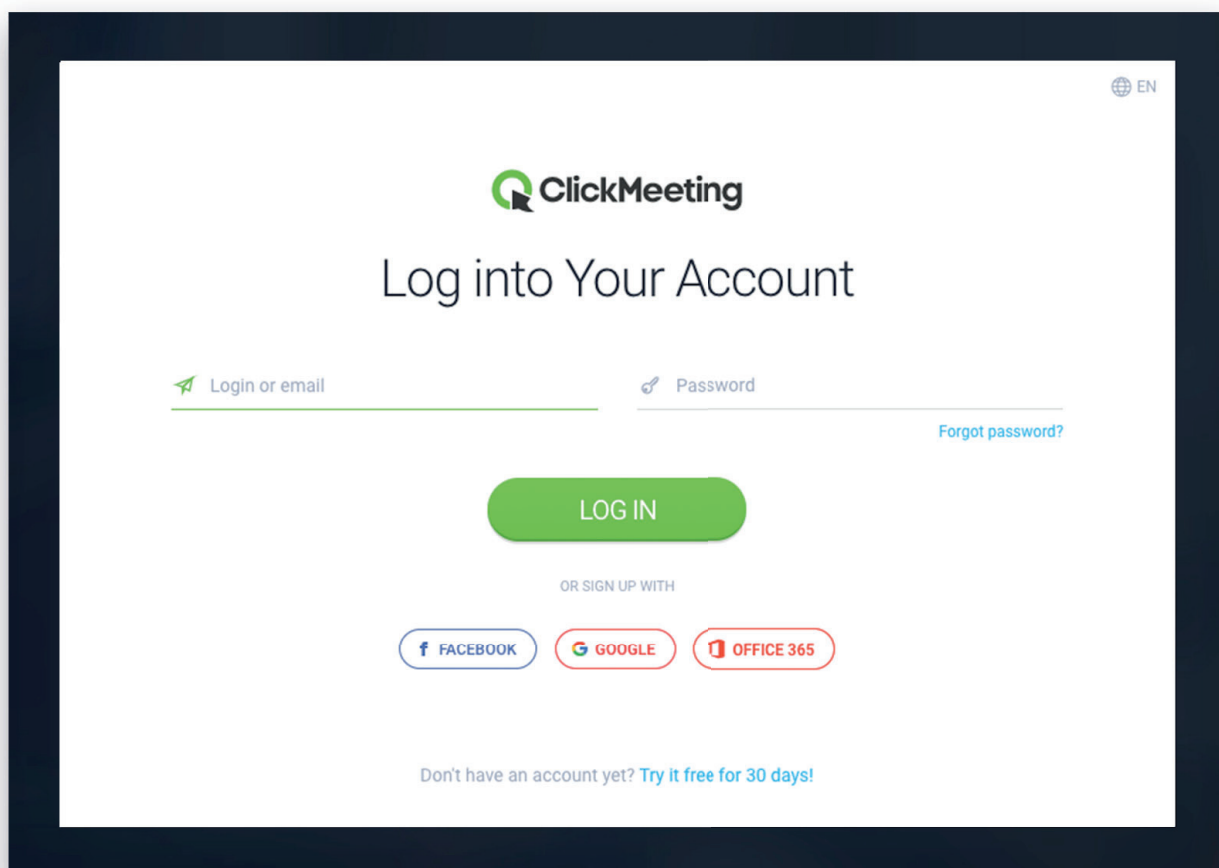
Effective work in distributed teams is possible. With the ClickMeeting webinar platform, you can easily connect with your employees, project team members, freelancers, customers, or business partners scattered all over the world.

In this manual, we will guide you step by step through the planning and conducting of online events, pointing out the most important tools for efficient communications, document sharing, and collaboration on complex projects.

1. First step – create your account

We are starting with an account on the ClickMeeting platform. Click [here](#), to create it or [here](#), to log in to your account.

If you are just starting with ClickMeeting, you will receive an email message with an activation link. Click it to activate your account and then log into your **account panel**.



The image shows the ClickMeeting login page. At the top right is a globe icon and 'EN'. The ClickMeeting logo is centered. Below it is the title 'Log into Your Account'. There are two input fields: 'Login or email' with a green arrow icon and 'Password' with a key icon. A 'Forgot password?' link is to the right of the password field. A large green 'LOG IN' button is below the fields. Underneath is the text 'OR SIGN UP WITH' followed by three buttons: 'FACEBOOK' (with Facebook icon), 'GOOGLE' (with Google icon), and 'OFFICE 365' (with Office 365 icon). At the bottom, it says 'Don't have an account yet? Try it free for 30 days!'.

2. Second step – plan your meeting

After logging in to your account panel, you can immediately start planning your first conference or meeting with remote employees.

Click the **“Schedule meeting”** button in the right upper corner of the main page of the panel.



Schedule

Schedule webinar

Schedule meeting

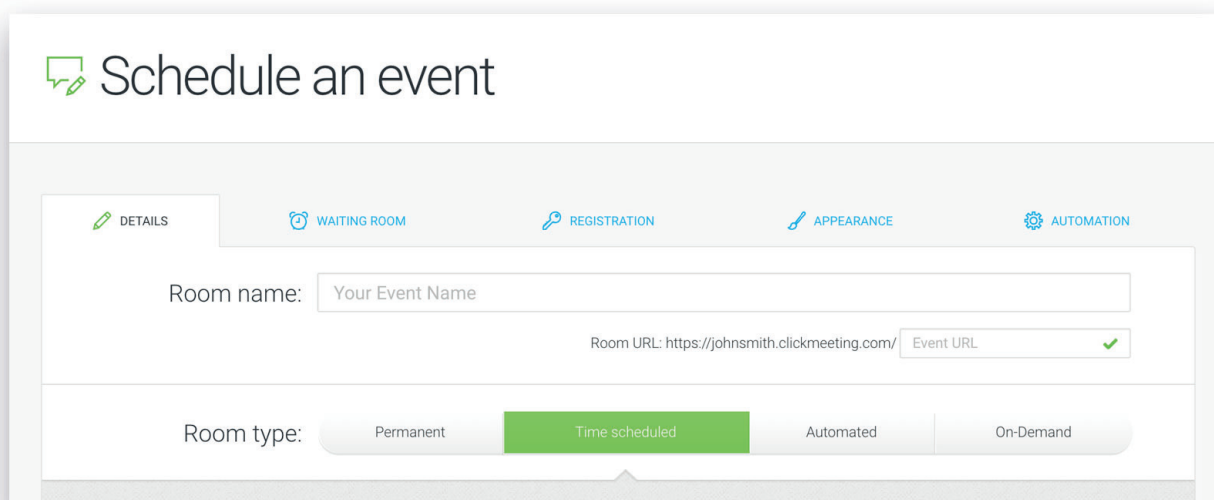
Ad hoc event

The event settings are now displayed in front of you. Start with the basics, i.e., **the right name for your meeting**. This will make it easier for other attendees to quickly understand the purpose of the meeting, and in the long run, you will be able to easily find the conference by its name.

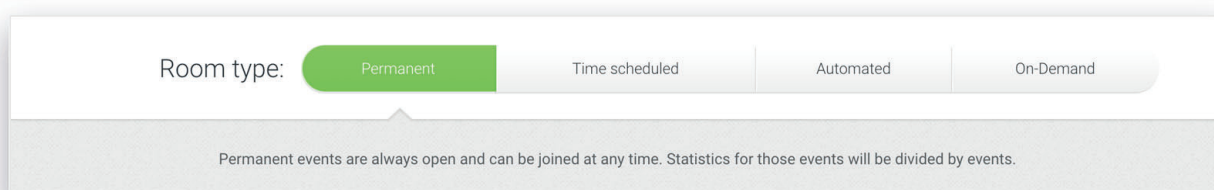
What are the sample names of online meetings held on the ClickMeeting platform? Here they are:

- ✓ Salary planning;
- ✓ Board meeting;
- ✓ Quarterly meetings;
- ✓ Finance committee meeting;
- ✓ Team meeting;
- ✓ Project scope overview;
- ✓ Leaders briefing;
- ✓ Project status and reports.

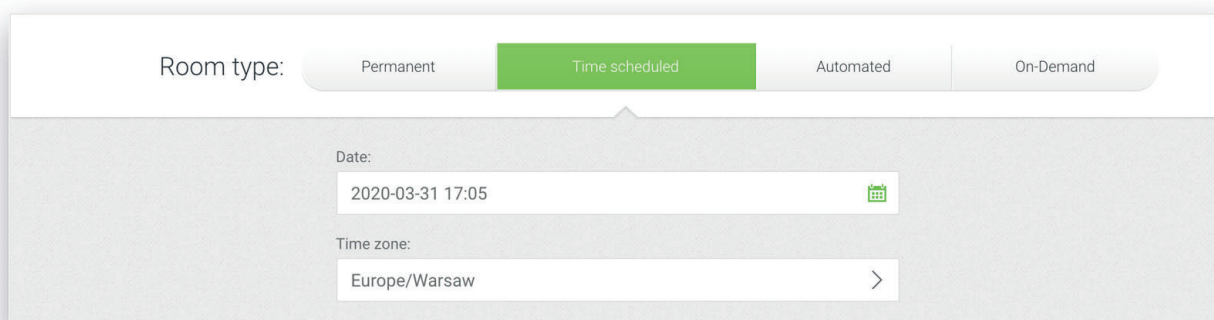
Please note that the name of the event will also affect **the event URL**, in other words, the address of the webinar room – your virtual conference room.



Next, specify the **room type**. In the case of video conferences and business meetings, you should choose **live events**. So, you can skip the two tabs on the right side – Automated and On-demand.



Choosing the **permanent room** means that you will create an event that will be a meeting place for you and your team. It will always be open, and you will be able to join it at any time to discuss current topics and exchange files.



The **“time scheduled”** room will let you set up a specific date and hour of your event as well as to adjust it to the time zone.

That way, you can create many events with different topics as well as with different groups of attendees.



Access type: **Open to all** Password Token Paid [Phone access numbers](#)

Access type is another important element of your settings. By default, the event is **open to all**, which means that everyone who receives the event link will be able to easily join it.

However, if you organize business meetings concerning projects and confidential information, it is worth securing the event with a **password...**



Access type: Open to all **Password** Token Paid [Phone access numbers](#)

Enter password:

Your password (not case sensitive)

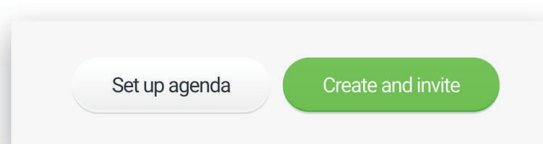
...or a token.

Please remember that you will be able to gather **up to 40 people** in your virtual conference room.

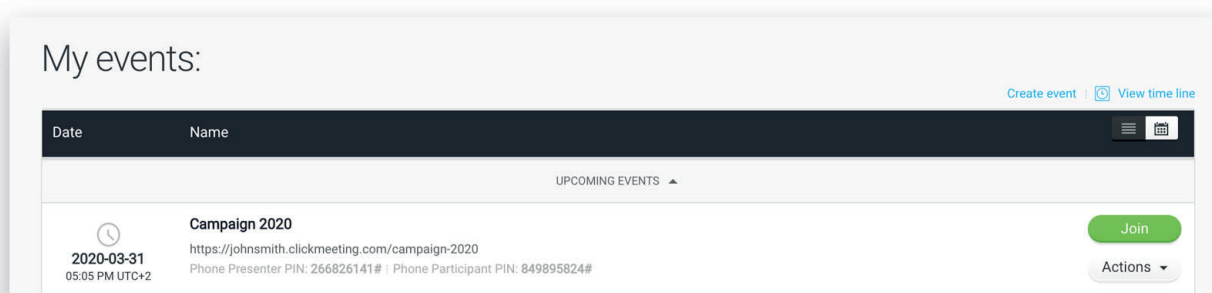
Technically, you will have **40 audio feeds** at your disposal. This means that 40 attendees will be able to speak during meetings. Same goes for video feeds – up to 40 users can enable their cameras during a meeting.

NOTE! If you plan to host online meetings on your trial account, you will only have 25 audio streams available. In practice, 25 attendees will be able to participate in a discussion during a meeting.

Ok, now it is time for the last step of the event planning process. Click the **“Create and invite button”**.

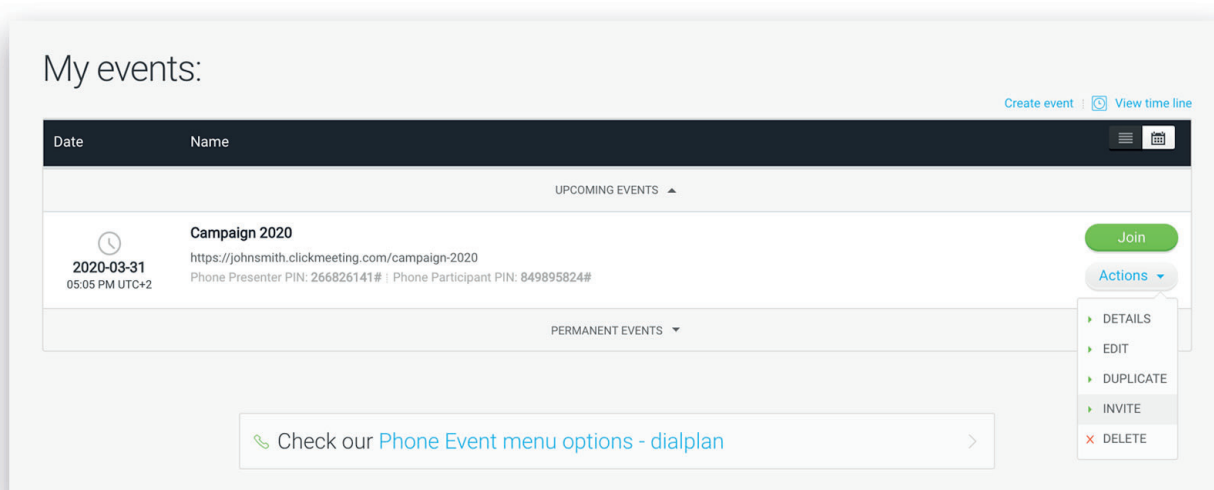


Congratulations! Your event is already set up! Remember that you can edit the details, change the settings, or invite attendees at any time. You can find the event on the main page of your account panel.



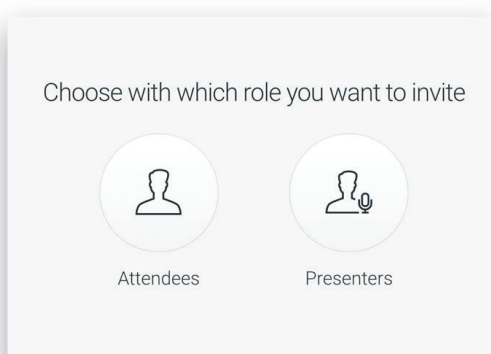
3. Third step – invite your attendees

Now it is time to invite your remote employees to the meeting you have just created. Click the **“Actions”** button on the right side of the event and choose **“Invite”** from the drop-down list.



You will see two options to choose from – you can invite either **attendees or presenters**. For online meetings, up to 40 attendees can turn on their microphones to be fully active during a conference. The presenter, however, has full control over the event. He can run the presentation, show videos, share the screen, or end the event.


At this point, you can decide whether only you are the leader of the event or whether someone else can have the presenter’s rights. Other people can be attendees.



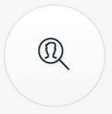
After clicking the **“Attendees”** icon, you will be redirected to the page with several options to upload your contacts – your future attendees.

The easiest way will be to copy the email addresses of your colleagues and paste them in this field.


Which way would you like to invite attendees




Copy and paste




Search



My groups



Past sessions




Copy details

Enter your contacts

Copy and paste email separated by comma, space or semicolon. Email addresses shown in red are invalid.

☐ Add to my Contacts for easier access

 **0/100**

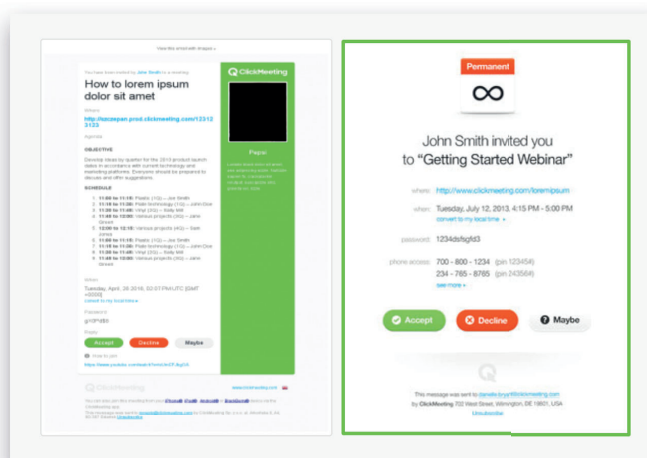
Once you have added your whole team to your meeting, click **“I’ve finished adding contacts”**.

I've finished adding contacts

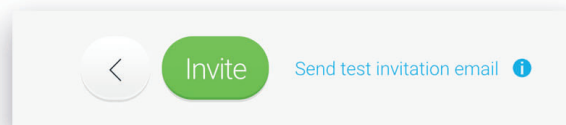
Then, select an email template for your invitation.

< Choose email template

You have two options – either advanced or simplified invitation.



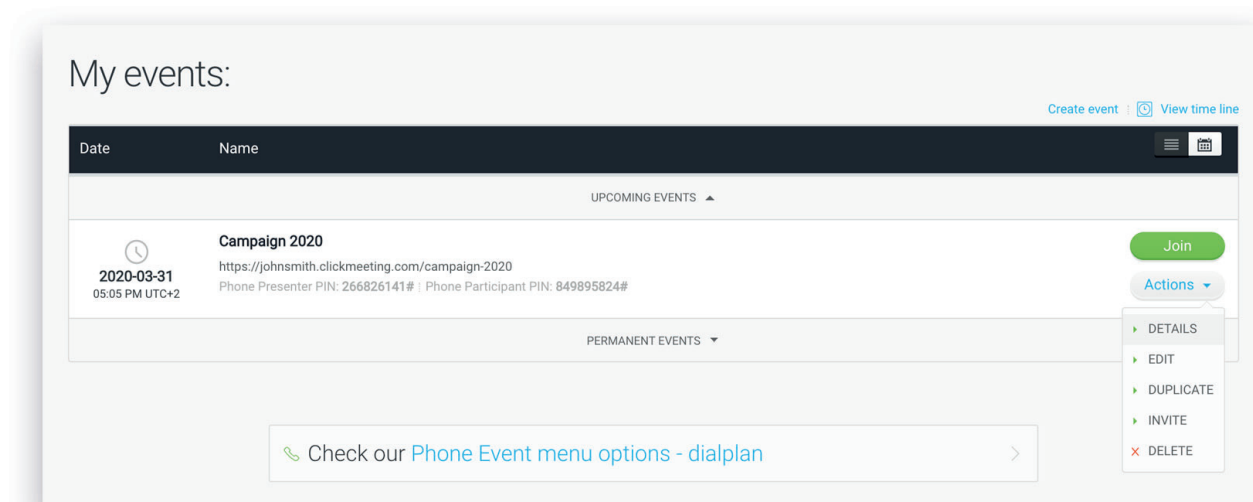
Choose the one which you like best and click **"Invite"**.



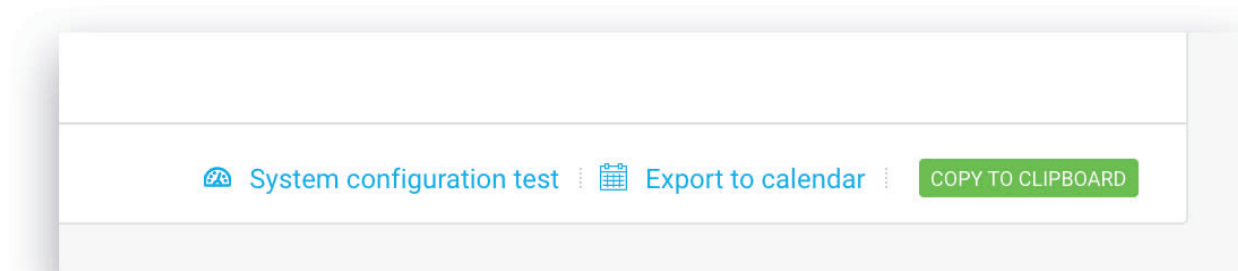
4. Fourth step – check the configuration of your system

It is completely justified if you worry if everything goes smoothly. To make sure your device is prepared to run the event without any problems, use the "System configuration test" option.

You can find it by clicking the "Details" button on the right side of your event on the main page of your account panel.

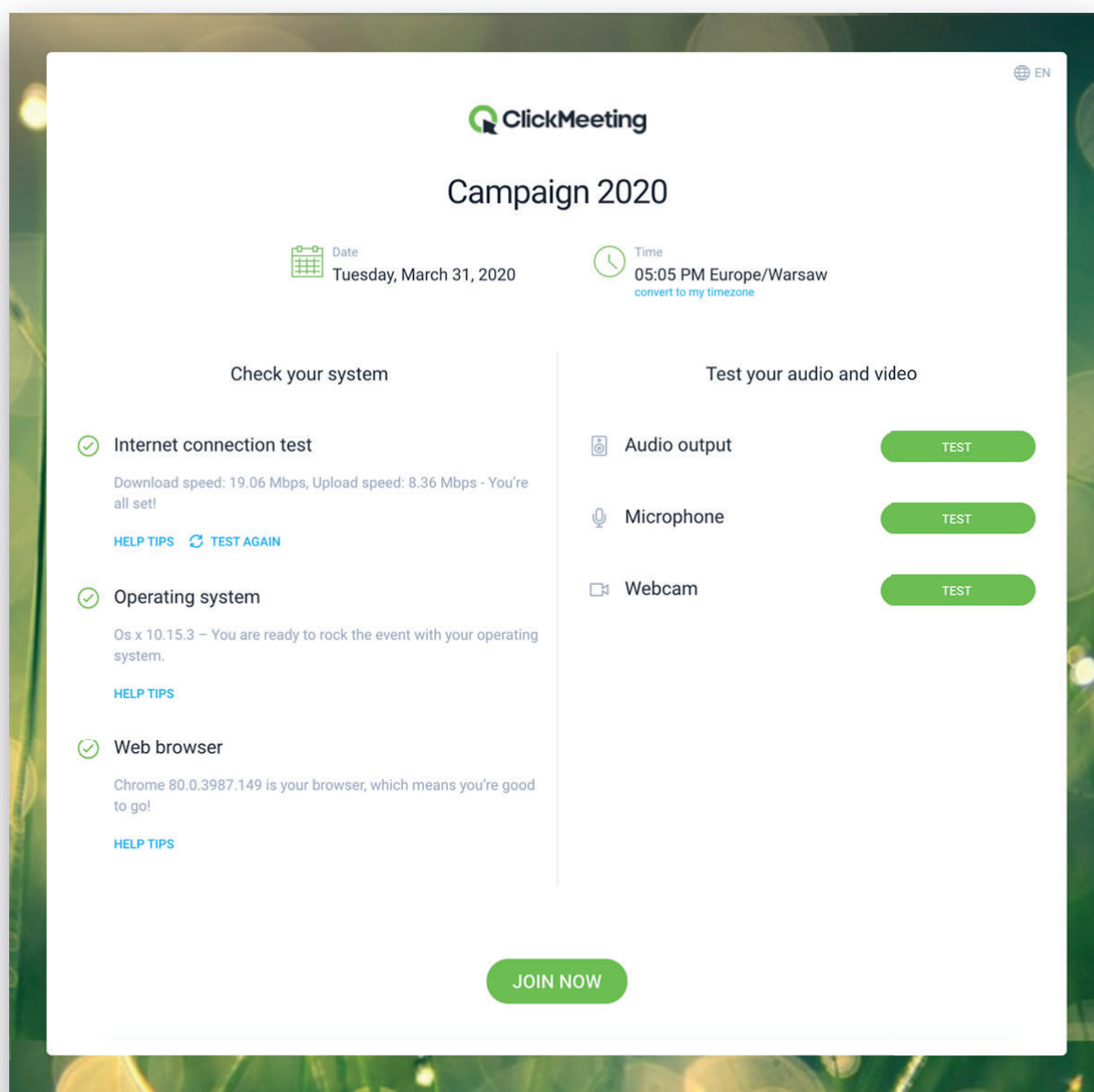


Then click the "System configuration test" link at the bottom of the event details page.



You will be redirected to the page where you can:

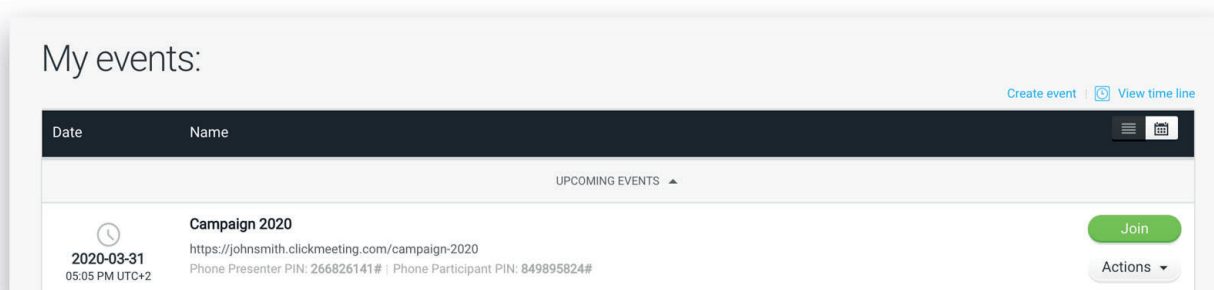
- ✓ Check your Internet connection;
- ✓ Check if your operating system is compatible with our webinar platform;
- ✓ Check if your browser allows you to conduct the events without any issues;
- ✓ Check if the system easily connects with your audio, microphone or camera output.



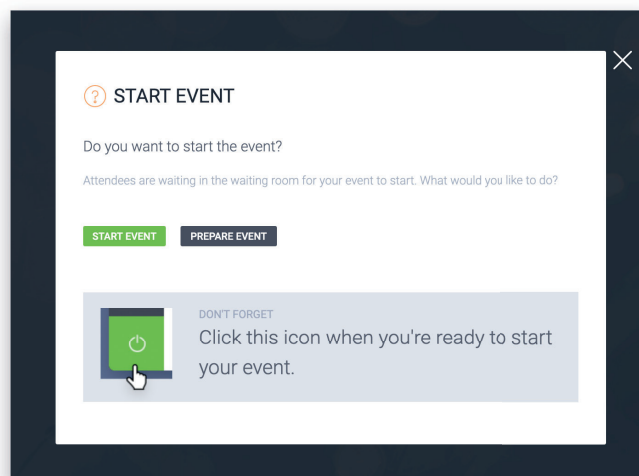
5. Fifth step – prepare your event

The event is ready, the coworkers are invited, so it is time to **prepare your meeting**. Do your best to make the most of your time together in the virtual conference room and join the webinar room before the event starts.

To do it, get back to the main page of your account panel, find your event on the list, and click the **“Join”** button.



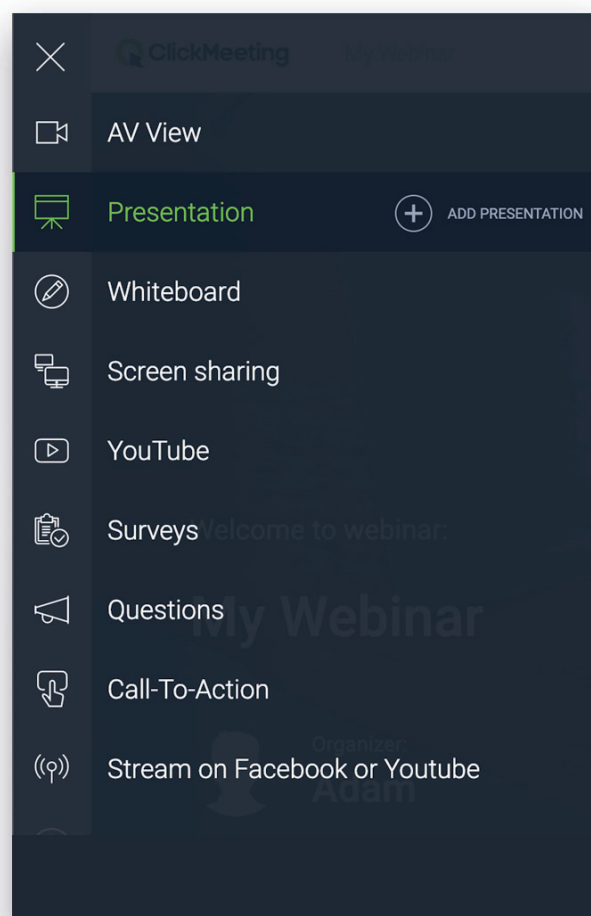
You will be automatically redirected to the event room. Two options will be available on your screen – **“Start event”** and **“Prepare event”**.



Choose the option on the right if you want to prepare the event before attendees start to join your meeting.

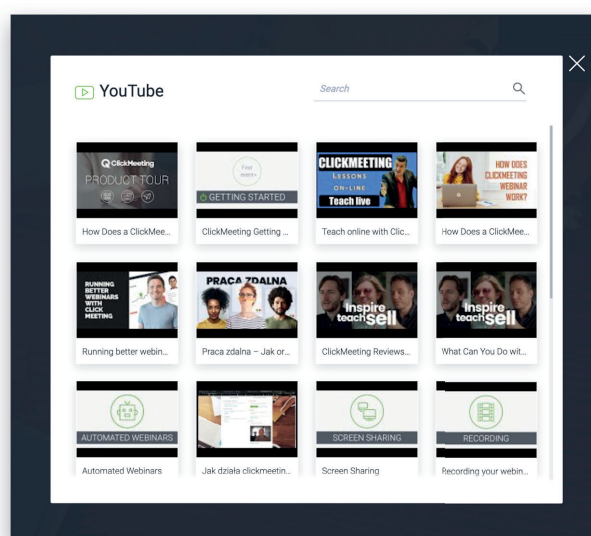
Presentation and other files

Your next step is to upload the materials necessary to discuss them during the meeting. In the menu on the left side, add your presentation or any other files: text files, graphics, videos, or spreadsheets.



! PRO tip

Make sure that your file size does not exceed 500 MB. If you plan to present a bigger video material, use the YouTube option.



Audio and video

Although you have already checked your system configuration, make sure you do not have another application running (such as Skype) that uses a connection to your microphone or webcam.

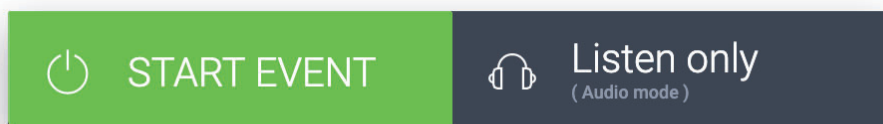
Your browser may display a message requesting permission to access your webcam.

Remember: once you close your event room, the provided **changes will not be saved!**

6. Sixth step – start your event

At this stage, you have already performed the system configuration test and prepared your room for an effective remote meeting.

You can start the event and greet your attendees now.

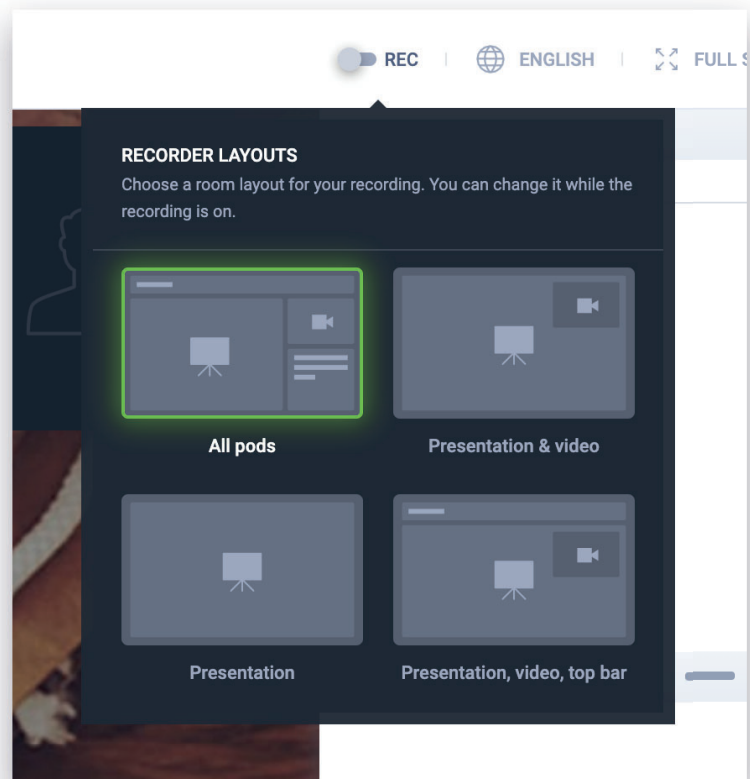


Click the **"Start event"** button in the left bottom corner of your event room.

PRO Tip – Record your event

If your meeting is a training session for your employees, and you would like to use this material for future training with the help of automation, take advantage of recording your event.

You will find the **“REC”** switch in the right upper corner. You can decide what your recording should look like.



It may include:

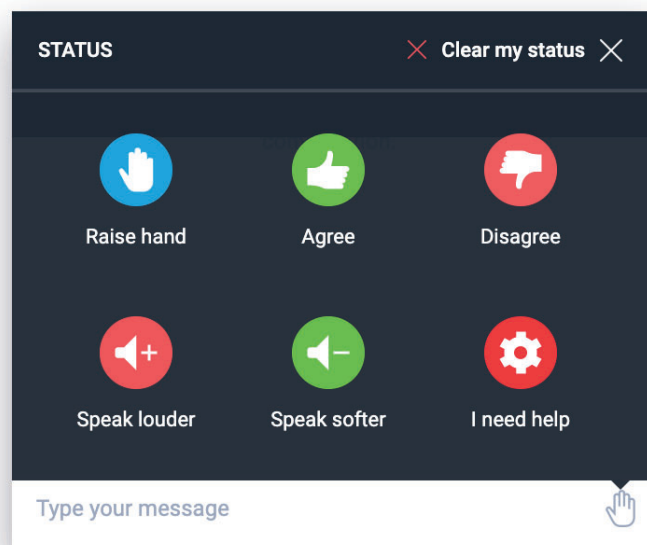
- ✓ All pods of your event room (a presentation, an attendee list, a chatbox);
- ✓ Presentation, top bar and AV pod (a pod where you will be seen as a presenter);
- ✓ Presentation and AV pod;
- ✓ Presentation itself.

Chat

You are holding an online conference, which means that each attendee can speak during a meeting.

To ensure it runs smoothly and without any major issues or overlapping voices of several people at the same time, you can use the **chatbox** to write short comments and ask questions on the ongoing topic.

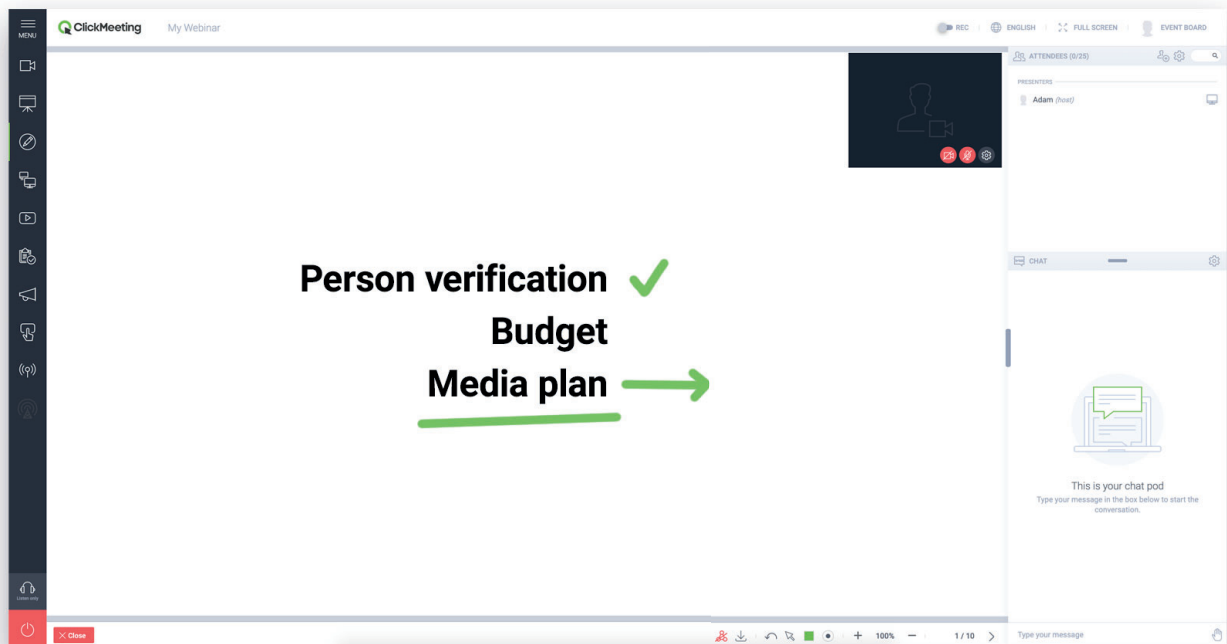
Each attendee can also express their approval or disapproval with one click or report their willingness to ask questions by clicking the status **"Raise hand"**.



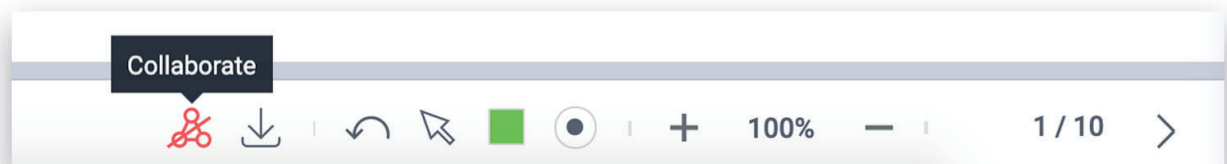
Whiteboard

Apart from the standard presentation, which you have already taken care of earlier by adding it to your room before the event, you use other interactive tools during your meeting.

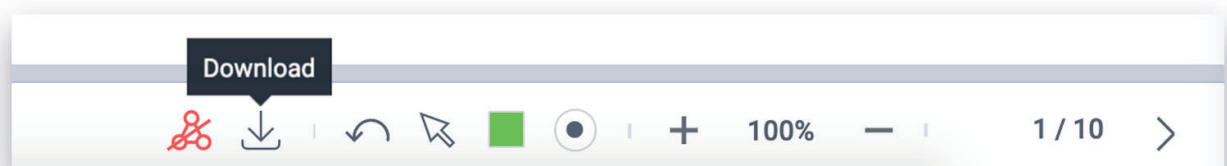
One of them is the **Whiteboard**. You have 10 pages at your disposal, where you can write, draw, add shapes (rectangle, circle, line, or arrow) or images uploaded from your computer.



Click the small red **“Collaborate”** icon at the bottom of the whiteboard and make use of the full interactive potential of this tool. Enabling this feature will allow attendees to make changes, highlight important issues, or draw shapes between different elements.



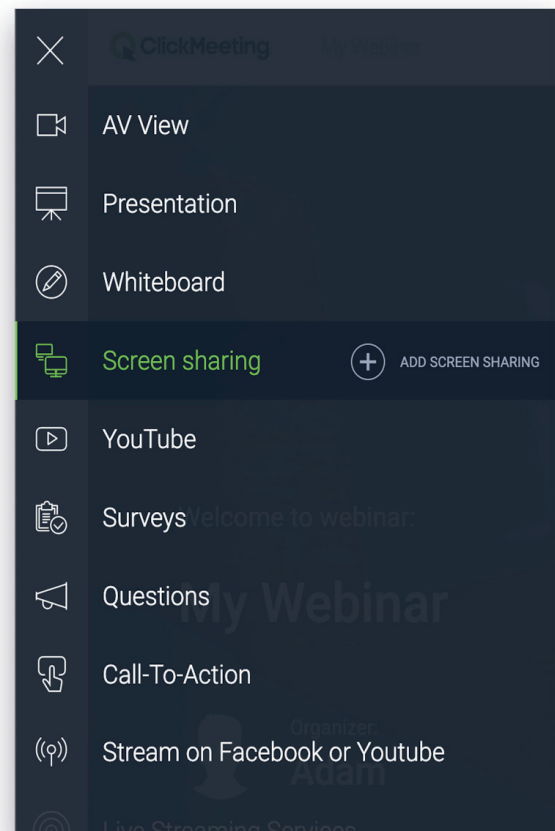
Remember that you can **download** the results of your team’s work as a **PDF file**.



Screen sharing

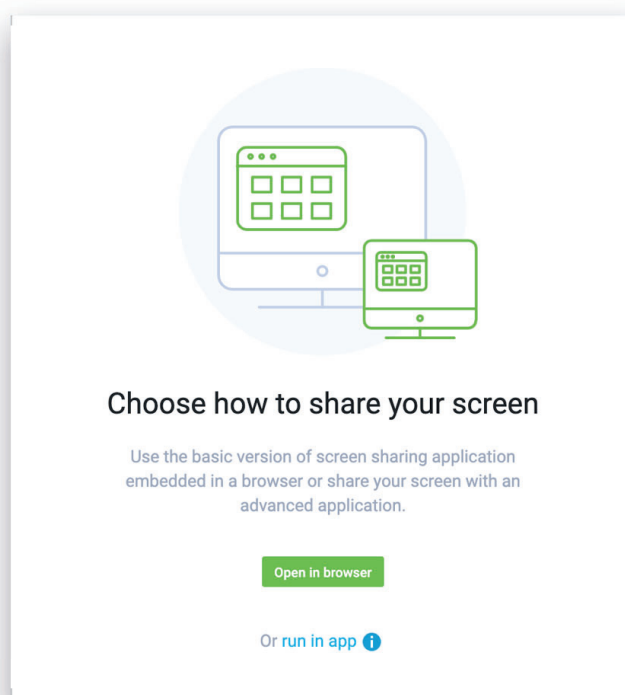
The possibility to provide attendees with the results of your work, important documents in real-time, or to run a new application step by step is the essence of an online meeting.

To launch this option, choose **“Screen sharing”** from the menu on the left side of the event room.



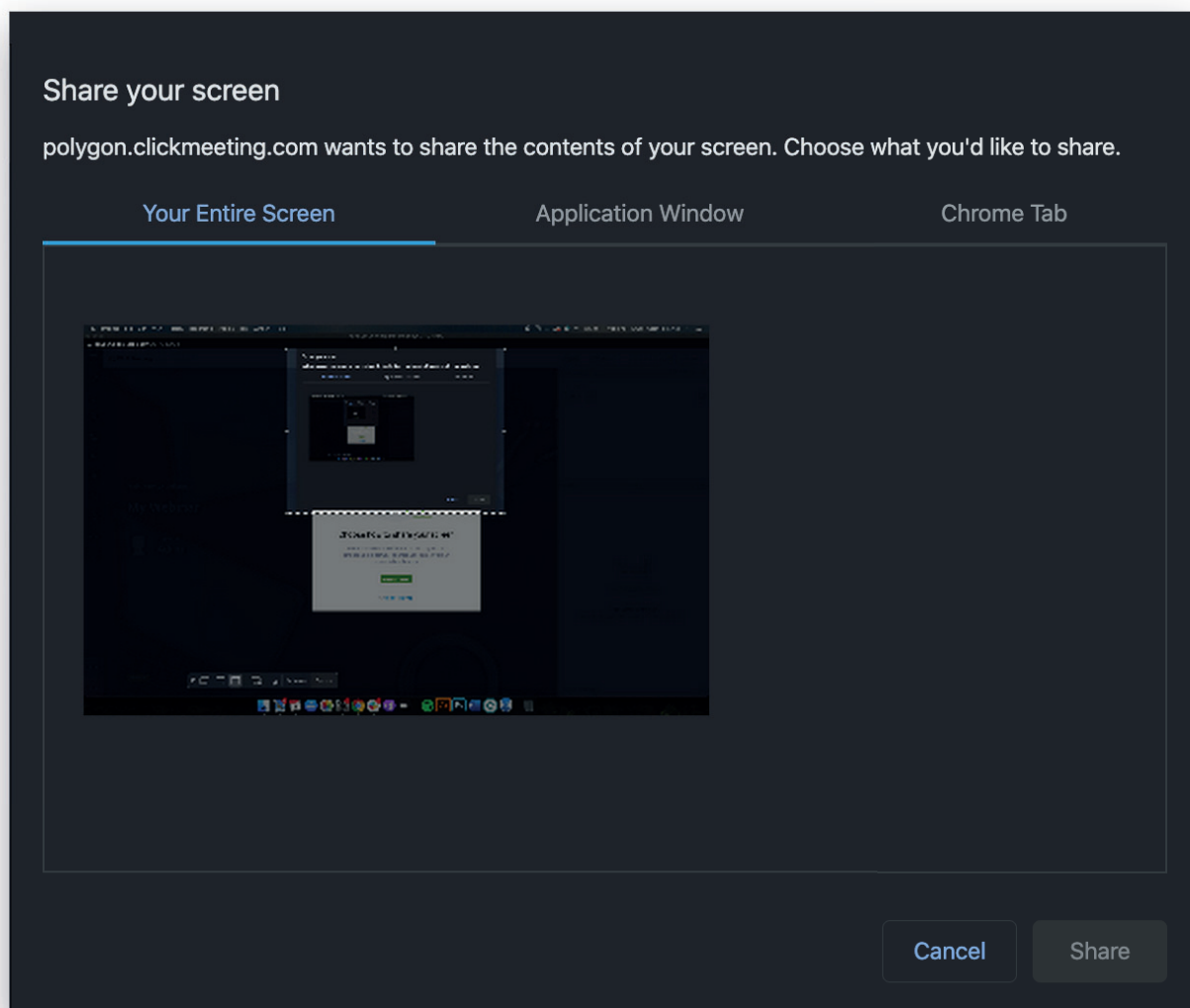
You have two options to choose from:

- ✓ Start screen sharing via your web browser:

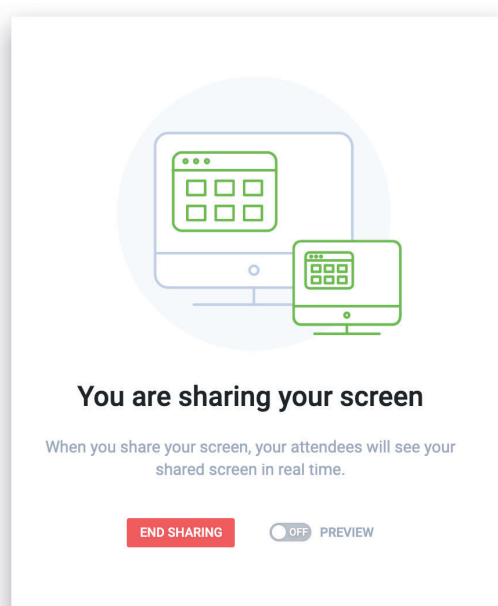
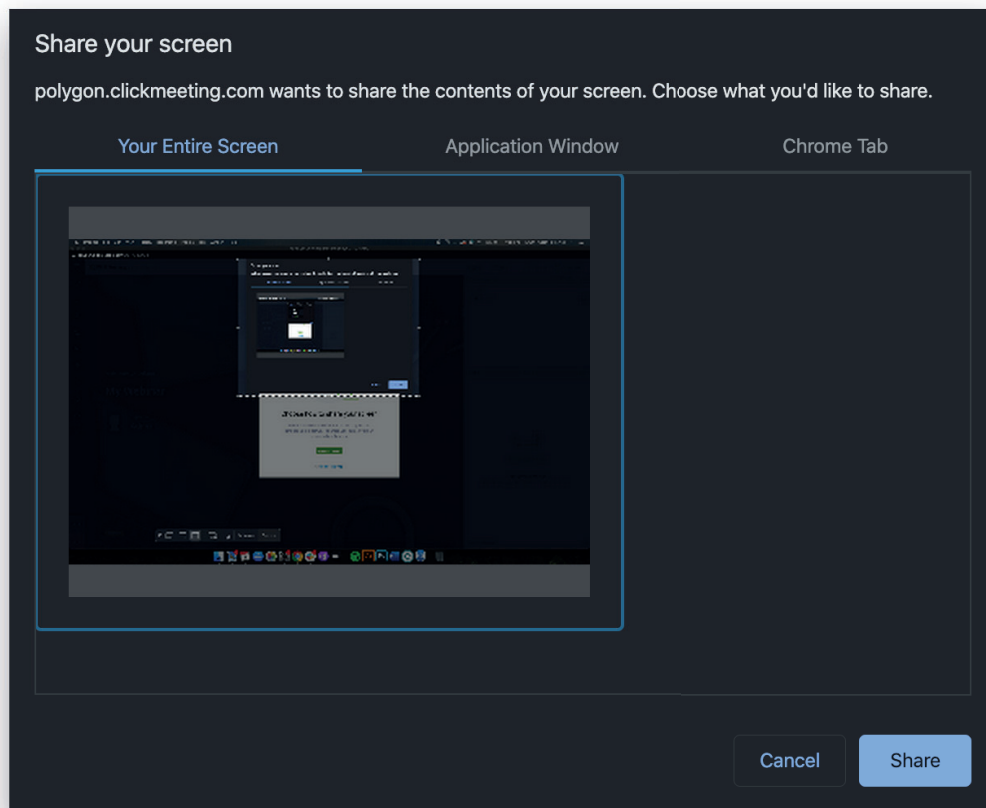


Click the “Open in browser” button to start using it. You will see a screen with a choice of three options for what you want to share:

- 1) Your entire screen;
- 2) Application window;
- 3) Browser tab.



Select the option you are interested in, e.g., the entire screen and click the “Share” button.



At this point, your colleagues can see what is happening on your desktop.

You can easily turn on the preview of what you are sharing and end sharing.

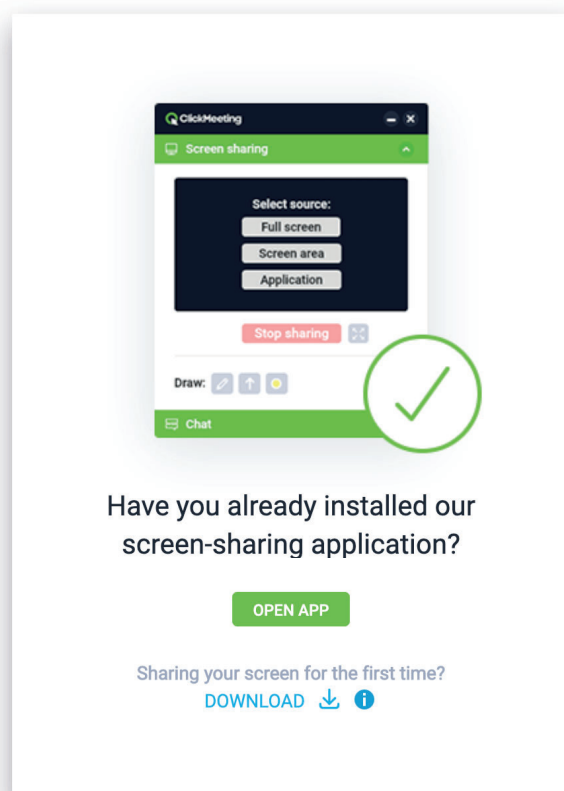
✓ **Installing a screen sharing application** is your second option.

The system may ask for your permission to use this application.

If you have already used it before, just choose the **“Open app”** option.

If it is your debut, you will have to download the application.

After downloading the file, you will have to go through the installation process.



7. Seventh step – end your meeting

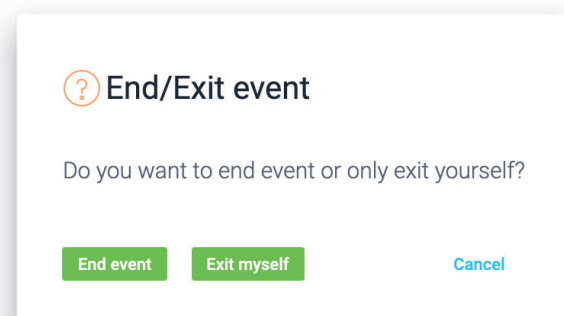
Excellent! Your online meeting is over. Say goodbye to the attendees and inform them about the date of your next event.



Click the red **“End event”** button in the left bottom corner of the screen.

A new window will appear on your screen where you can:

- ✓ confirm the end of the meeting and close the event room;
- ✓ leave the room, but leave the meeting open, so your coworkers can continue if they feel they need to.



If you want to know more

Below you can find helpful links for presenters:

- ✓ Online teaching:

https://knowledge.clickmeeting.com/uploads/2020/03/nauka-online_EN.pdf

- ✓ How to join an event:

<https://knowledge.clickmeeting.com/infographic/how-to-join-an-event/>

20 tips for presenters:

- ✓ https://knowledge.clickmeeting.com/uploads/2015/03/20_tips_for_presenters.pdf

First steps in the webinar room:

- ✓ <https://knowledge.clickmeeting.com/uploads/2018/03/Getting-Started-with-the-Webinar-Room.pdf>

Our video tutorials:

- ✓ <https://knowledge.clickmeeting.com/video/>

In our Knowledge Base, you can also find answers to frequently asked questions:

<https://knowledge-new.clickmeeting.com/faq/>

Below you can find helpful links for attendees:

- ✓ How to join an event:

<https://knowledge.clickmeeting.com/video/joining-an-event/>

- ✓ Helpful infographic:

Before the event

Open the webinar in the updated version of one of supported browsers.

 SUPPORTED



CHROME



FIREFOX



OPERA



SAFARI



YANDEX



EDGE



INTERNET EXPLORER



EDGE

 NOT SUPPORTED

Mobile access? We do support Chrome and Safari on smartphones as well as a dedicated mobile app.




 BROWSER



CHROME



SAFARI

 MOBILE APP

In the webinar room

Not seeing or hearing anything?



Can't hear anything? Reload the page and check if the tab is not muted.



RELOAD THE PAGE

www.clickmeeting.com/...

MUTE



EXAMPLE SHOWN IN CHROME

Not seeing or hearing anything?

Audio or video are not smooth enough? Release some bandwidth. Close unnecessary programs on the device and additional browser tabs.



The sound was muted.

☒ Allow sound

☐ Keep muted

Done

EXAMPLE SHOWN IN CHROME

Is video pod in the way? Click on the icon to dock the window to the right corner.



Have a great webinar!

