How to Administrate Webinato Like a Pro

Word from the CEO

Hi,

Welcome to Webinato — the 4th generation release of the smartest online media platform you can use forhosting exciting, engaging webinars.

Webinato has been rigorously engineered and developed from over 10 years of demanding customer requirements. We are proud to say that our platform was built specifically for major companies who wanted carefully designed features to handle their multi-media presentations successfully.

Your Webinato account functions much like a conference center would for your company. Inside this conference center you can add individual conference rooms with each one set up and configured differently. This way you can have rooms for things like sales presentations, online training, or corporate announcements. Each room can be ready to go for a specific function or purpose — a huge time saver.

Inside every Webinato room, you'll find all the tools you could possibly need to host more exciting, more engaging and hopefully more successful online events. This quick start guide will walk you through how to access and administer Webinato admin portal in few easy steps. Please take a few minutes and carefully go through this guidestep by step.

If you have any questions or need any help, please don't hesitate to ask support or reach out to your accountmanager. We'll do whatever is necessary to make sure you can use our platform successfully.

Last but certainly not the least… thank you allowing us the opportunity to serve you.

Best,
Belal Atiyya
CEO

In this document, we will explain how to configure your Webinato experience in 6 steps.

- Step 1 - Getting Started

  Personalize the Webinato platform by adding a logo, URL of your company, contacts and customer support information

- Step 2 – Set up Your Profile, Roles and Users

  Add super admins, billing contacts, moderators, presenters and other types

- Step 3 – Get Access Information

  Learn about access links, public pages and privacy

- Step 4 - Modify the Webinar Room

  Modify the webinar room with your brandings and security

- Step 5 – Manage Autopilot Recordings (Recasts)

  How to share, secure and request static (MP4) files

- Step 6 – Managing Reports

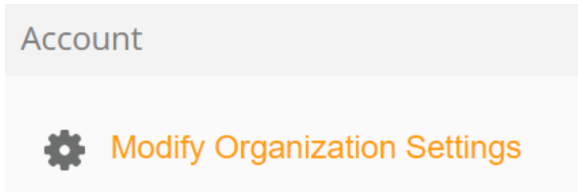
  View, download and process reports and statistics and even certificates

- Step 7 – Extras

  Managing events, setting up payment information and integrations

Organization Settings

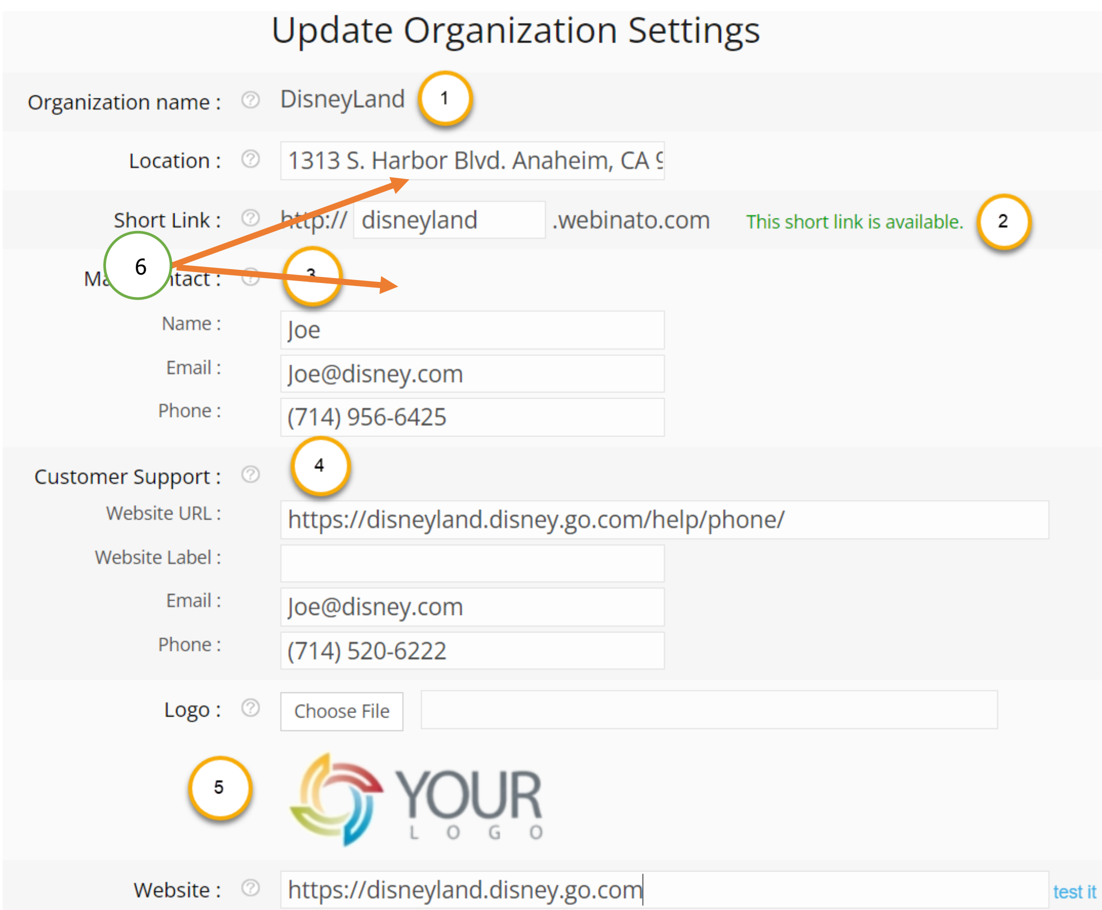
First, let's login and go to your Admin Page (located at yourcompany.webinato.com/adminpage). Then we will modify a few organization settings as a start.



By default, you should see the Edit Organization Settings page upon first login, but if not, click on *Modify Organization Settings*.

***Tip**: If you are NOT a Super Admin, you will not see this section (neither moderators, nor presenters can access organization settings and billing page).*

What you can do with these settings



1. This name is selected by you when purchasing Webinato (signing up). If you think a different name works, let the customer support team know.
2. One of the most important things is to select the short link (subdomain). This is the link you are going to use and provide to other users.

   ***Tip**: If your short-link is not available, try a different phrase.*

3. *Main contact gets all the information from Webinato, including updates and billing statements/invoices. So, be sure to add the specific person's contacts.*
   ***Tip**: This won't be displayed to the customers, for internal use only.*
4. Customer support contact is the one that is displayed to anyone who is having trouble accessing your services on Webinato. Adding all the details can save the customer during difficulties.
   ***Tip**: Do not add Webinato customer support contacts here.*
5. Logo and link to your website can be added here. When someone clicks the logo, he/she will be taken to the link you specify here.
6. **Always use Tooltips to learn what the option and it does**

Optional Settings

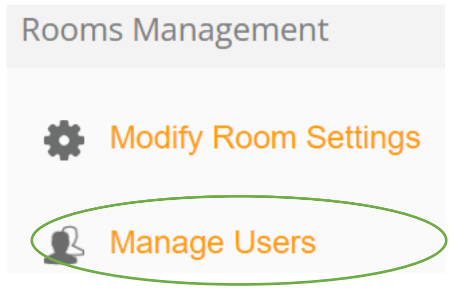
1. Webcast Header and Footer: If you are planning to use Events, when created and published, the event displays in a public page where attendees can register from (you can even disable public access – see 3rd item below). The link is similar to *https://disneyland.webinato.com/webcasts* (replace disneyland subdomain with your account's subdomain). You can add a header/footer to this section.
2. Email BCC Address: Use this email to get all the emails from Webinato (only 1 email is allowed).
3. Disable Main Registration Page: To disable the public page that displays events as well as recordings (recording page will be similar to *https://disneyland.webinato.com/archives*).

Advanced Settings

- API Credentials: A super admin can get the company password with the API key by clicking the link. Only the company ID and External API key is displayed here.

Important: When setting up your account, be sure to set Time Zone and Time Format. Get to *Close Room After* under the *Room Functions* (page 10) and *Time Settings* under the *Room Layout* section (page 12).

Manage Users



In this step you can add your team, different roles and even attendees to your account. To start adding users, you must be a super admin. Log into the admin page and click on *Manage Users* to start.

Brief on User Types and Roles

User Roles

- Super Admin: The all-powerful user who has access to all the sections in the admin page. One super admin account is enough in most cases.
- Billing Contact: The first super admin by default becomes the billing contact. You can add more billing contacts without the need of room access permissions.
- Guest Presenter: This is a shared account with a common password – suitable for guest presenters who won't occasionally access the webinar room. Upon login, a first/last name is requested as it got shared credentials and any number of guest presenters can join.
- Organizer: An organizer is able to fully access and control the webinar room features.
- Presenter: Similar to an attendee but with enough webinar room controls (modules and certain tools such as polls).
  Tip: *A presenter cannot send announcements, cannot start recording as well*.

- Organizer/Presenter with extended admin rights: An organizer/presenter with access to the specific room(s) and manage Room Settings, View Reports, Manage Events and Recordings.
- Registered User: An attendee who has email/password credentials to access your webinar room and manage his/her own profile.
- No Access: A user who cannot access any webinar room.
- Guest User: Guest access is shared and any number of users can log in as guest attendees.
  Important: *Be careful when sharing guest attendee access. Anyone can access your room with such credentials. If you shared if for free access, change the guest password before the next webinar*.

Adding a New User

1. Click **Manage Users** option,
2. Click **New User,**
3. Provide the details,
4. If you are adding a super admin, billing contact or guest presenter, select the checkboxes
5. Let the system generate a password or specify one manually
6. Add a BIO that will appear when a viewer in the webinar room clicks on an organizer/presenter and click Biography from the menu (like below)

7. Scroll down and select the room(s) to access if there are multiple rooms, and set the **role,**
8. Add admin rights for an organizer/presenter,
9. Click **Create**,
10. The new user will get an email with credentials and login details (links, etc.)

Managing Suspended Members

There is an option to unban users in the *Manager Suspended Members* option. If you ban someone in the webinar room the user is added to the blacklist here. To reinstate, select the appropriate user and then click *Reinstate*.

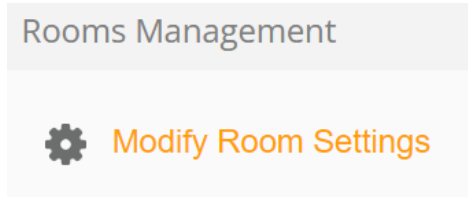
Get Access Information

You should know how to obtain the login details and shared with your colleagues and teams and even with attendees (unless you are using Single Sign-On).

How to view login/other details

1. Click View Access Information (Login) under Rooms Management,
2. View the self-explanatory details and links. Carefully read the instructions/explanations.

Basic Room Settings

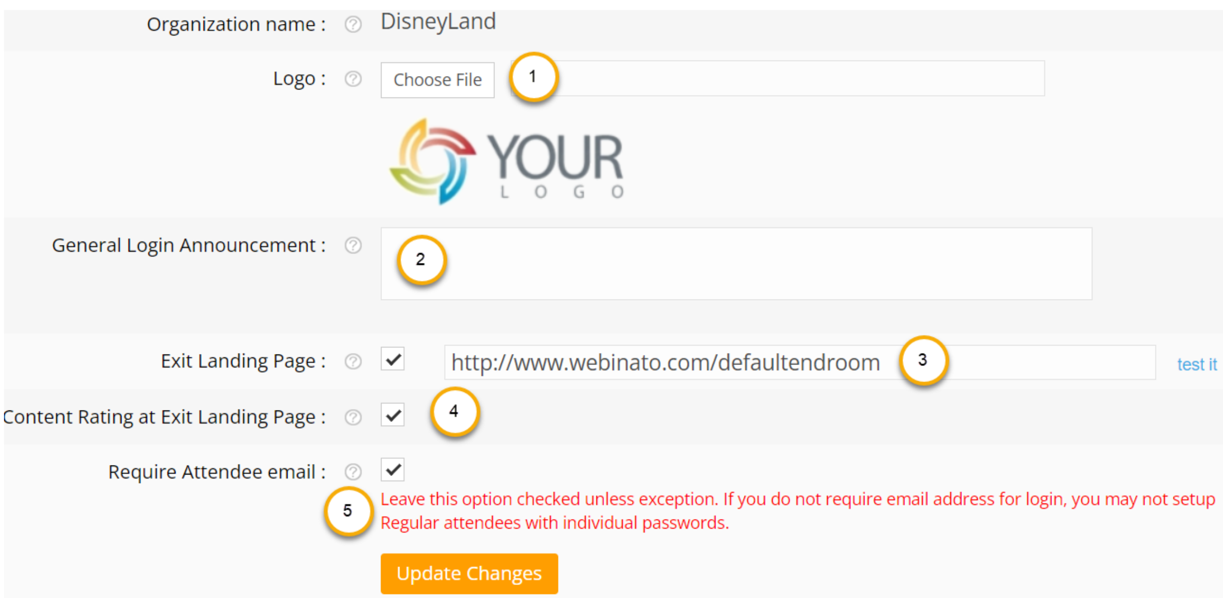


Click on *Modify Room Settings* > click on *room1* (default name) to get to the settings.

Common Settings for All Rooms

These settings are useful when you have multiple rooms.

***Tip**: Some of these options are available for individual room settings as well. Such changes will override common room settings. A banner for a specific room for instance can override common banner set up here*.



1. A logo for all the rooms,
2. The login announcement that appears in general chat welcoming all participants who access the webinar room,
3. The page where you would like your attendees to redirect to when they exit or when you end the webinar room for all participants,
4. Set up a built-in survey to capture content rating for your webinar content (this survey is pre-determined by Webinato),
5. To make a session anonymous uncheck **Require Attendee emails**. At other times, be sure to turn this on

Room Specific Settings

Each webinar room got its own set of settings. Click the room name from the list to get to the room specific settings. There are four different categories of settings in this page.

Room Access

***Tip**: These settings do not require a room/session restart – if the session is active in the webinar room, ending it for all is not required.*

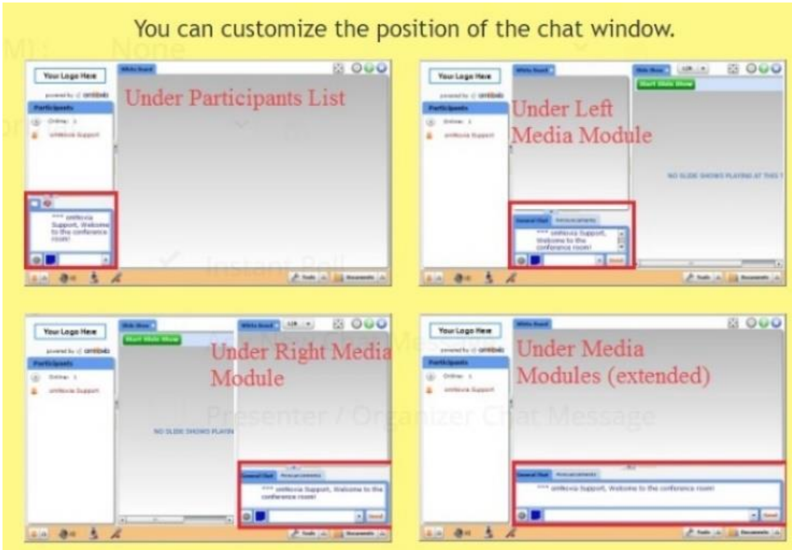
1. Room name: By default, it is *room1*. You can change it here.
2. Short Room URL: The direct link to the webinar room.
3. Guest Attendee Password: By default, this is enabled and the password is *webinato*.
   Tip: Without a guest password, the room becomes public and anyone can log in without a password. The best practice is to keep this enabled, change it, but don't disable it.
4. Login Announcement: This is also available in *Common Room Settings*. But if you set it here, it is unique to the specific room and overrides the other. When enabled, any participant who logs into the room sees a **welcome message** in the **general chat**.
5. Require Phone Number: If you need to collect a phone number of the attendee, enable this option. This is also an optional setting.

***Important**: The next sets of options require a room/session restart, except for the advanced options (see below).*

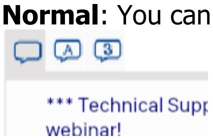
Room Functions

Chat Options - Some of the advanced options are explained here.

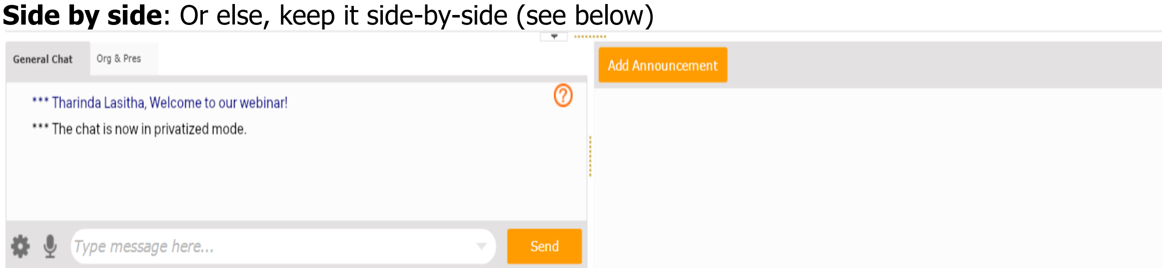
1. Chat History: Up to 50 lines of chat
2. Privatize Chat: Can be changed **on-the fly** in the webinar room. To do so, click the chat options cogwheel as a moderator (organizer) in the general chat > tick/untick the option there > Save.
3. Additional chat tabs: You can have general chat tab (1), a private tab for organizers/presenters (3), and an additional tab if you wish to (for instance for technical support purposes).
4. Audio Chat
   a. Enable a label in the general chat to make as a question (Q),
   b. Enable sending voice messages,
   c. Or, enable/disable both.
5. Chat Positions: There are 4 positions you can select from.
   ***Tip**: To change this on the fly in the webinar room, click the cogwheel at the upper right-hand corner (**settings and options**) > go to the **Layout Manager** and use the dropdown menu (see below).*



6. Announcement Mode:
    a. **Normal**: You can set it along with the chat tab (see below)



    b. **Side by side**: Or else, keep it side-by-side (see below)



__Tip__: The side-by-side position is most suitable when the chat position is __Under Media Modules Extended)__

- Show Documents Folder: Displays the documents folder in the webinar room at the bottom right.
- Status Indicator: Allows a participant to select a *mood* from a set of emojis.
- **Close Room After**: Another very important option is to keep this longer (4 minutes is the default). If there is one organizer in the webinar room who gets disconnected and unable to make it, the room will end after the expiration of this timer.

  ***Tip**: You can increase this up to 999 minutes*.
- Room Conference Bridge: Allows users to dial into the webinar room (the person must still access the webinar room). This is not available for mobile users.

Room Layout

These options can customize the room layout and appearance. Some of the advanced options are discussed here.

1. Top Banner: If you have set up this in *Common Room Settings* page, you can override it from this setting. This option is room-specific.
2. Attendees Can: What attendees can do to the layout
    a. See the names of the media modules (such as Slides, Screen Sharing),
    b. Switch Media Module Tabs: This gives the freedom for the attendee to click and change to the desired media tab,
    Warning*: Use this option with caution, as the attendee may be looking at some other tab while the presenter is in another – better to avoid unless it is required*
    c. Open Collapsing Panels: You can collapse/expand panels as an organizer but if you are willing to allow attendees to do it (for instance keep the chat/participant panel collapsed to get a wider view), enable this option,
    d. View Number of Participants: An attendee can view the number of participants at the upper-right corner of the participant panel. You can hide if from here,
    e. View First Names Only: When enabled, attendees see first name in full and last name with a letter (example: John W.)
3. Attendee List: You can hide the participant list from attendees and even from presenters with this dropdown menu.
4. **Time Settings**: Make sure you set the Time Zone and AM/PM Vs 24-hour view. This is one of the most important options as reports, time displayed in chat and everything depends on this selection.
5. Exit Landing Page: Select a web-page or a survey as the landing page when someone leaves the room or when an organizer ends the room for all.

Advanced Settings

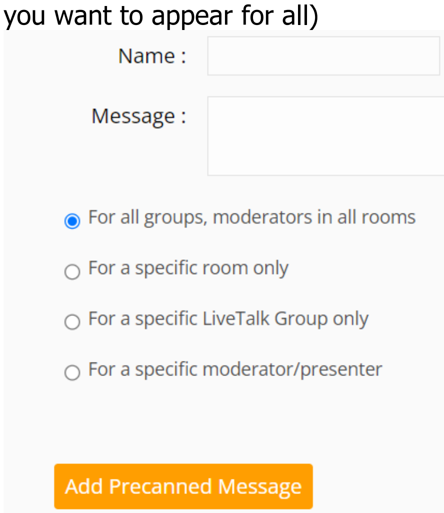
1. Record Attendees into Autopilots: If you are willing to record the actual attendee list in the live session and their chat into the autopilot to give attendees a **more realistic experience when viewing the autopilot**, enable this option.
2. Enable Co-Attendee Feature: This will allow an Organizer or Presenter to input additional names underneath an existing Participant name. This is for situations where a group of people are attending a webinar under one login, such as in a conference room or similar setting.
   Tip*: To add a Co-attendee in the webinar room, click the name of a participant > click* ***Add Coattendee*** *from the menu, provide details and save*.

3. End Room API URL Call: For developers – please refer *https://help.webinato.com/support/solutions/articles/5000601991*
4. User Entry / Exit API URL Call: For developers – please refer *https://help.webinato.com/support/solutions/articles/5000601992*

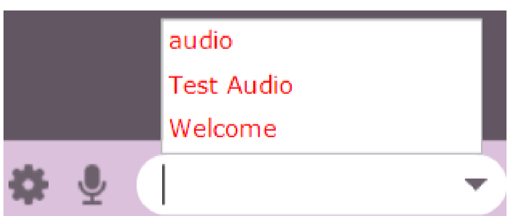
Add / Remove Predefined Chat Messages

Next to the Common Settings for All Rooms, this option is also available. This is a great option if you are willing to use *chat shortcuts*. Here's how to do this.

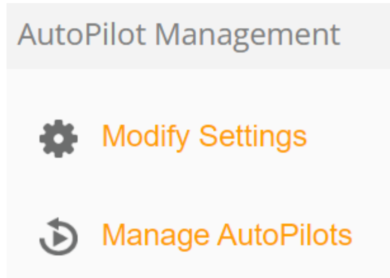
1. Click on this option
2. In the next page, click *Add New Precanned Message* – to update/delete an existing one, use the other option below
3. Add your precanned message here – be sure to select the group carefully (ignore the 3rd option as it is phased out). *Name* here is the shortcut (audio for example, and then the longer *Message* you want to appear for all)



Tip: How to use a chat shortcut in the room – in the chat, type the first 2 letters of the ***Name*** *or drop the carrot button (see below) > click one of the available* ***Names*** *> Press the Enter key or* ***Send*** *button*.



Manage Autopilot Recordings (Recasts)



Autopilot™ is a patented recast technology invented by Webinato. Unlike most other platforms, Webinato recasts provide interactivity and live experience. Managing Autopilot include two parts. One is setting up the options as well as security. The second is the management and conversion of the actual recordings.

Obtaining Access

To access the Autopilots, you can obtain the link is 3 ways.

1. Obtaining the access from the Autopilot Recorder (organizer/presenter only),
2. Get to the Admin page > Manage Autopilots > Expand the Autopilot for details,
3. Public archives page – by default publishing on this page is enabled. You can turn it off from *Modify Settings*. The link is like https://disneyland.webinato.com/archives (replace disneyland with the subdomain of your account)

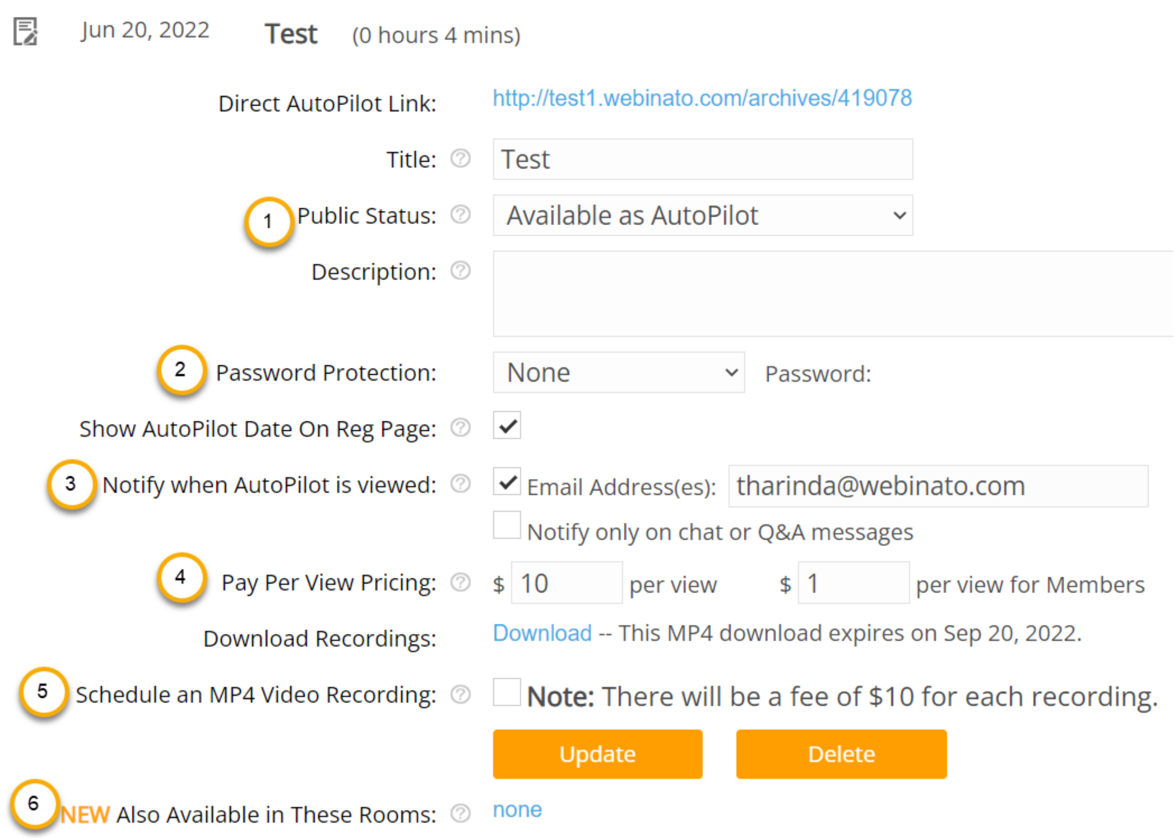
Manage Settings

Some of the important settings would be,

- Auto Publish Recordings: Turn this off to prevent publishing on the archives page,
- Header and Footer of the Archives Page: Settings relevant to the public archives page,
- Recorded Session Available For: Determine the duration you would like to keep the archives (from *No Limit* to *12 Months*),
- Access Password: This is the most important security configuration. When this is enabled, first line of defense is set. The password will commonly be used with all the autopilots. However, using an individual password for each Autopilot is also possible.

Manage Autopilots

Click the button to view/edit the individual information of a recording in the *Manage Autopilots* page. Some of the advanced options are discussed here. The rest is self-explanatory.



1. The published state (on the public archives page). Select from,
   a. Available as AutoPilot – Interactive repla hosted by Webinato,
   b. Available as MP4 – If the Autopilot is converted, this option is also available. It is non-interactive (MP4),
   c. Unpublished – To hide if from the public archives page.
2. The following options are available with password protection,
   a. Company Archive Password: Set in the *Manage Settings* page
   b. Specific Password: Specify a unique password for the archive
3. Get a notification when someone accesses the interactive Autopilot,
4. Request payment for viewing the interactive Autopilot (refer *https://help.webinato.com/support/solutions/articles/5000601934*),
5. Provides the ability to convert the interactive Autopilot to an MP4 for administrators to download and publish on their website. Explanation of the available options are described here.
   ***Warning**: We do not provide HD quality MP4s*
6. If you purchased multiple rooms, you can make an Autopilot available to other webinar rooms as well.

Managing Reports

After the event has concluded, you can go to *View Room Usage Reports* from your Admin page. It will list all occurrences your webinar room has been used. There are extensive search options to help you once you have used your webinar room(s) many times. When you click on the particular date/time you are looking for, you candownload chat transcripts, poll and survey data, participant lists, etc. in CSV format.

In the Admin Page, click,

- *View Room Usage Reports* to view all the reports including recast reports,
- *View AutoPilot Reports* to view recording specific reports.

A comprehensive set of guides on reporting is available at,

- Room Usage Reports - *https://help.webinato.com/support/solutions/articles/12000015579*
- Where Do I Find Reports - *https://help.webinato.com/support/solutions/articles/5000685316*
- When are reports available - *https://help.webinato.com/support/solutions/articles/5000685317*
- Can reports be automatically downloaded? - *https://help.webinato.com/support/solutions/articles/5000685319*

What is available in a Report?

The following details are available in the web-based Report.

- Participant Location and Timeline,
- Participant Details,
- Certificate Report (whether it is sent or not, a button to manually send it),
- Instant Poll Results,
- Survey Results,
- Q & A Transcript
- List of downloaded documents,
- Chat Transcripts,
- Room Announcements,
- Link to Autopilots if recorded.

What is available in the CSV (Excel) Downloadable Report?

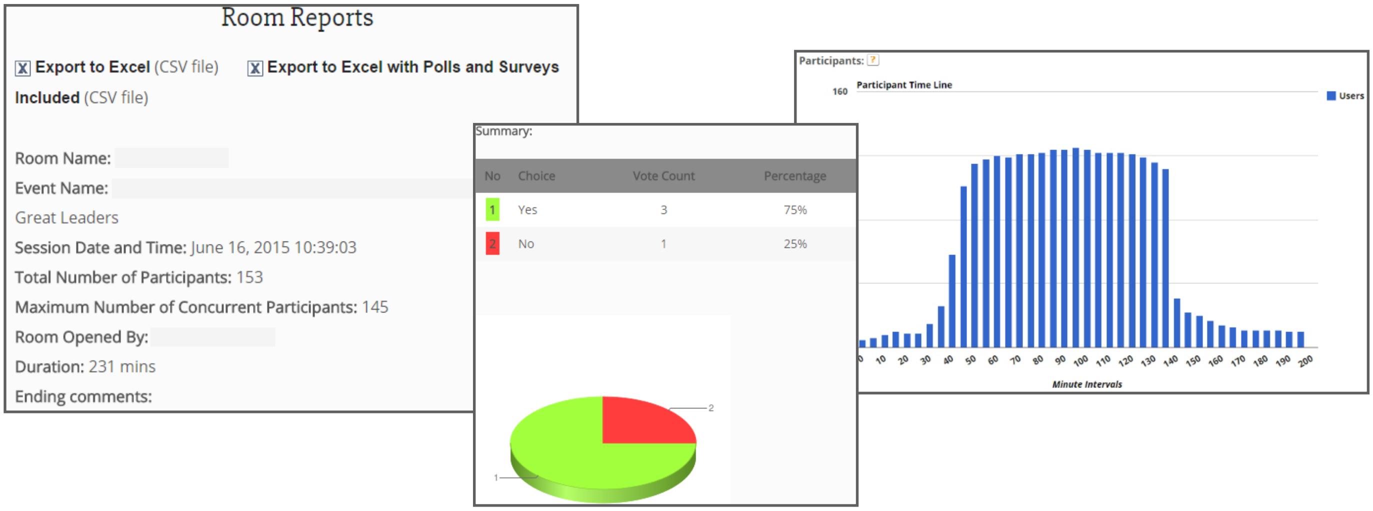
Tip: *You can download combined reports, and reports with combined headers.*

Warning: *Reports will be automatically removed after 180 days in most cases*.

- Mobile Number
- Type of the user's device (PC Vs Mobile)
- Attendance Frequency,
- Company Username (SSO only),
- OS, Browser, and Language,

- Opened Documents,
- Number of Popups (presence checks or polls) and number of clicks per each user,
- Answers to Custom Questions.

What if I need more info?



Moderator Guide: http://www.omnovia.com/sc/ModeratorGuide.pdf

Event Guide: https://webinato.com/sc/WebinatoQuickStartGuide.pdf

Attendee Guide: https://webinato.freshdesk.com/support/solutions/articles/5000601863

Visit help.webinato.com to search our knowledgebase or open a support ticket

Live Chat is available 24/7 and can be accessed via help.webinato.com

Phone Support is available from 8 AM – 5 PM Central Time by +1 415.394.8010 x2