

# **ONSIGHT HOW TO:** Onsight Connect for Windows (PC/Tablets)

# **Overview**

Onsight Connect provides secure video collaboration for you and your colleagues, suppliers, and customers. You can talk, see, and share live video, snapshots, or recordings, and draw onscreen with one or more participants to rapidly respond to issues or questions from the field. You can also capture pictures and record Onsight video sessions for future training purposes.

This document is for a new user who will be required to set up Onsight Connect for the first time. In order to use Onsight Connect, you will need to:

- 1. Setup and configure Onsight Connect
- 2. Learn basic operations
- 3. Explore advanced features

# **Setup and Configuration**

### **Step 1: Access and Review Your Welcome Email**



When you are allocated an Onsight license, you will receive a Welcome Email with links to download Onsight Connect software.





- 1. Download and install the software for your device and follow all prompts. Select from:
  - Download for Windows
  - Download for iOS (Apple store)/Android (Google Play)



**Note:** If you are asked for permissions to access your microphone audio, camera pictures, device's location etc. Click **OK**, **Allow** or **Yes**, as necessary.

2. Click the Login to Onsight Connect link to launch the application and login.

#### Step 2: Login



Login by entering your **User Name** and **Password.** Click to enable the **Remember Me** check box to automate the login process going forward.

#### Step 3: Check System Health



Before starting an Onsight collaboration call, click **System Health** and verify that the top four (4) indicators are green before proceeding. If not, contact your Onsight Admin.

Click here to watch the Check System Health video





# **Basic Operations**

#### Step 4: Add a Contact

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Click **Contacts** within the **Left Toolbar** to display all your contacts. There are two ways to add a contact:

- 1. Click the **Search** Q icon to display all contacts within your organization; or
- 2. Type the name of the contact in the **Search** field and click the **Search**  $\overline{\mathbf{Q}}$  icon.
- 3. Now enable the **check box** next to their name and click the **Plus** icon to add them to your contact list.

**Note:** If the **Plus** sign is missing, your system administrator has disabled manually adding contacts outside your organization.

Click here to watch Add a Contact video

### Step 5: Make a Call

Click **Contacts** within the **Left Toolbar**. Select one of the contacts listed to initiate a call.

Click here to watch the Make a Call video

#### Step 6: Receive a Call



You can also receive calls from your contacts. A message will appear that states Incoming Encrypted Call. Click **Decline** to avoid taking the call or **Accept** to engage.





#### Step 7: Share Video



When you are in an active Onsight call, click the **Share Video** button in the **Bottom Toolbar** to immediately share the live video from your camera, a picture, or a recording. The **Share Video** button will glow when you are actively sharing. To stop sharing your live video, simply click the **Share Video** button again and the button will change back.

*i*) **Tip:** If you want to see live video from another Participant's camera:

- Ask them to click their **Share Video** 🖭 button, or
- Click the **Participants** icon within the **Right Toolbar**. When the Participants Panel opens, click their **Share Video** button .

**Note:** If you try to share video from a participant that has **Remote Video Privacy** settings enabled, then the participant can **Allow** or **Decline** your request to share video. If the **Call Privacy** icon appears next to the **Hang Up** button within the Right Toolbar, then Call Privacy rules (Settings) are enabled.

### Step 8: End a Call



Click the **Red Hang Up** button within the **Right Toolbar** to exit a call.





#### Step 9: Pause/Play Video



When you are sharing media with other participants, you can click the **Pause** icon to stop or resume live video sharing. When you click **Pause**, the symbol changes to **Play**. Similarly, when you click **Play**, the symbol changes to **Play**.

*Tip:* You should consider pausing the video when you are moving between locations, or you want to discuss and telestrate on a specific visual.

#### **Step 10: Media Configurations**



Select **Video Settings & Stats** <sup>T</sup> to change your **Media Configuration** (Video Settings). Media configurations enable you to start a call at a lower bandwidth setting and if you need better video quality, you can increase the bandwidth as necessary.





# **Step 11:Tool Tips**

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Click **Tool Tips** within the **Right Toolbar** to display short descriptions for key functions within Onsight Connect.

# **Explore Advanced Features**

### **Step 12: Telestration Tools**



Telestration tools enable you to annotate and draw on top of an image or video with your finger, mouse, or stylus. Click the **Telestration** icon to access additional drawing tools. Refer to the Advanced Telestration video for more details.





#### Step 13: Take and Share a Picture



Take and share a picture: Click the **Take a Picture** (Camera) button to capture photographs. You will be prompted to share it with Participants.

**Note:** The **Share Video** 🖭 button is blue and a blue border surrounds the picture when it is shared.

### Step 14: Record Video



Click the **Record Video** con within the **Bottom Toolbar** to record the Onsight session. Onsight recordings include live video, audio, telestrations, and shared images. To stop recording, click the **Record Video** again.

*Tip:* When you click the **Record Video** con, a record icon appears as a status indicator next to the **Hang** Up con within the **Right Toolbar**.

**Related information** Support Just-in-Time Training Materials



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