



Onsight Connect User Guide

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Librestream Onsite Connect Guide

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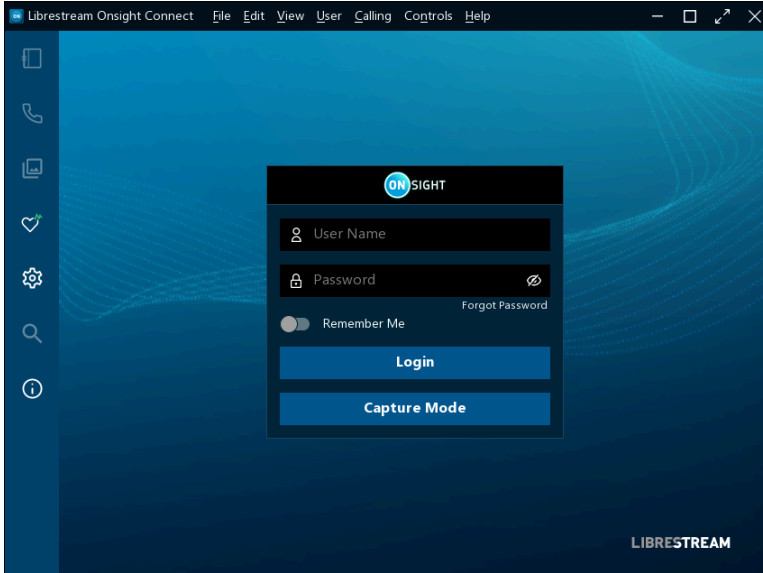
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1. OVERVIEW

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.

1.1. Login



Launch the Onsight Connect application and you will see a Login screen. To login, you need a **User Name** and **Password**. If you already have a User Name and Password, enter your information, and select **Login**.

If you have forgotten your Onsight Connect password, press **Forgot Password** to receive an email with a temporary Password. If you do not have an Onsight Connect user account, you may use **Capture Mode** to record content now and upload it later. Contact your system administrator to get an Onsight Connect user account, as necessary.

1.2. Logout

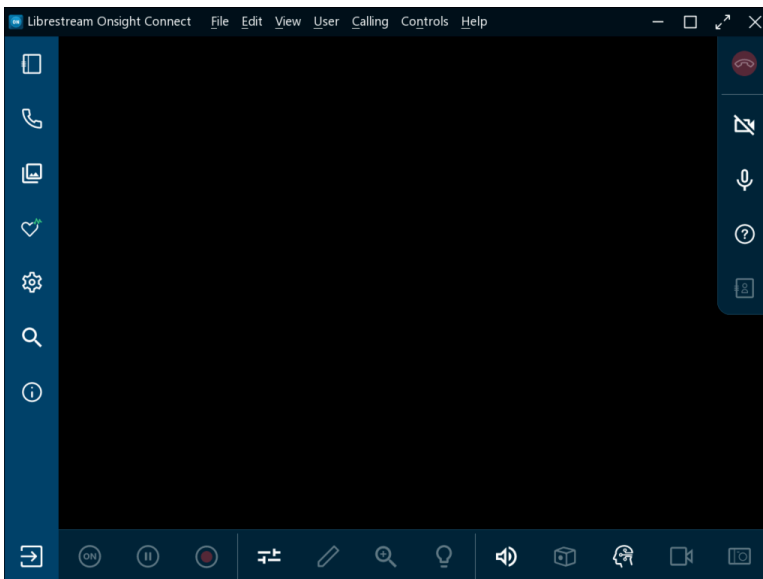



Figure 1-2 Logging Out from Onsight Connect

If you logged in using your Onsight account, click the **Logout (Exit)**  button within the **Left Toolbar** to return to the login screen. If you are in Capture mode, click the button to return to the login screen.

1.3. Application Controls

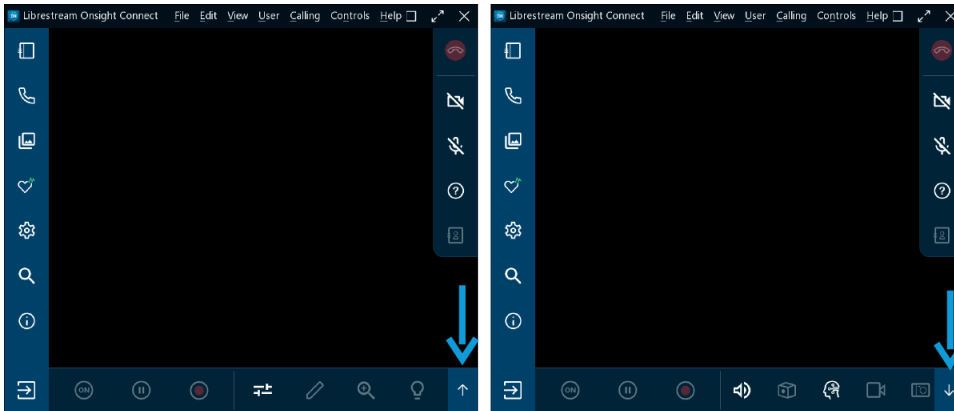






Figure 1-3 Hide/Reveal Functions



Onsight Connect uses specific application controls to simplify navigation. For example, you can:

- Hide/Reveal functions
- Control pop-up display
- Toggle native and fit to fill Resolution

Hide/Reveal Functions

The Onsight Connect application can be resized to fit any sized screen. When the application window is small, the user-interface hides functionality and replaces the icons with **Up** and **Down** arrows. Clicking the **Up**  arrow or **Down**  arrow enables you to cycle through hidden icons. Similarly, when the **Left**  arrow or **Right**  arrow display, you can click these icons to collapse and expand the toolbars smaller or larger to reveal more functions.



Note: On mobile devices, the left and right arrows can be replaced with two up  or down  arrows.

Control Pop-up Display

When a pop-up window appears, you can close it by clicking anywhere outside the pop-up, within the collaboration window to make the pop-up disappear.

Toggle Native and Fit to Fill Resolution

When your camera is on, you have the option to display media in three sizes: **Native**, **Fit to Height**, or **Fit to Fill**. To enlarge the video picture, double-click the collaboration window to toggle from **Native** to **Fit to Height**. Double-click again to toggle from **Fit to Height** to **Fit to Fill**. Repeat again to toggle back to **Native**.

1.4. Supported Languages

Onsight Connect supports the following languages: English, French, Chinese, German, Italian, Portuguese (Portugal and Brazil), Swedish, Russian, and Korean.

2. ONSIGHT CONNECT USER INTERFACE

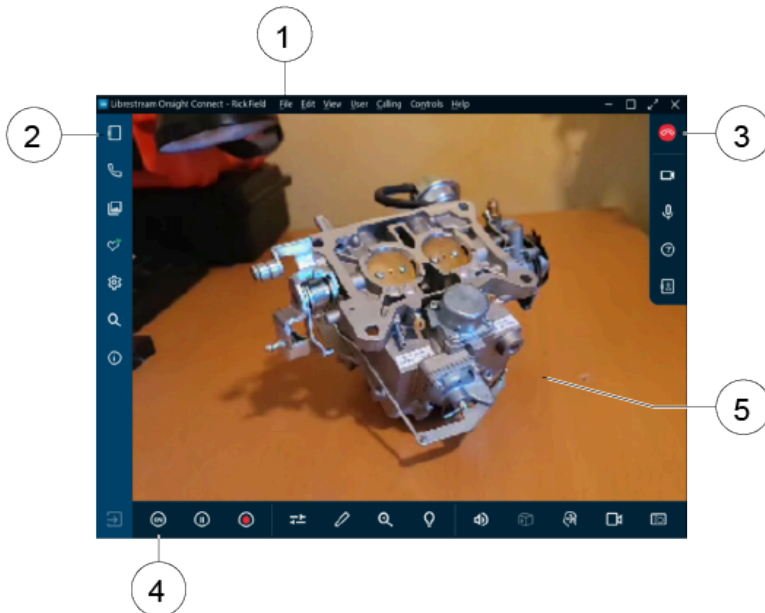



Figure 2-1 OnSight Connect User Interface

1. **Main Menu** (Windows) — Includes the following menu items: **File, Edit, View, User, Calling, Controls,** and **Help.**

 **Note:** The **Main Menu** is only available on the Windows platform.

2. **Left Toolbar** — Includes calling operations such as: Adding contacts; reviewing call history; locating your files; exploring OnSight Connect settings; searching functionality; and exploring online documentation.
3. **Right Toolbar** — Includes active Call Functions such as: Hanging up a call; enabling/disabling your camera; audio; and using tool tips to identify key functions.
4. **Bottom Toolbar** — Includes video Functions such as: Sharing/playing/pausing video; exploring your video settings; adding telestration (Drawings) to your media; Zooming in/out; using Illumination to highlight detail; exploring audio settings; cube functions; accessing translator functions; sharing your screen and exploring camera functions.
5. **Collaboration Window** — Where video and image content are shared.

2.1. Left Toolbar

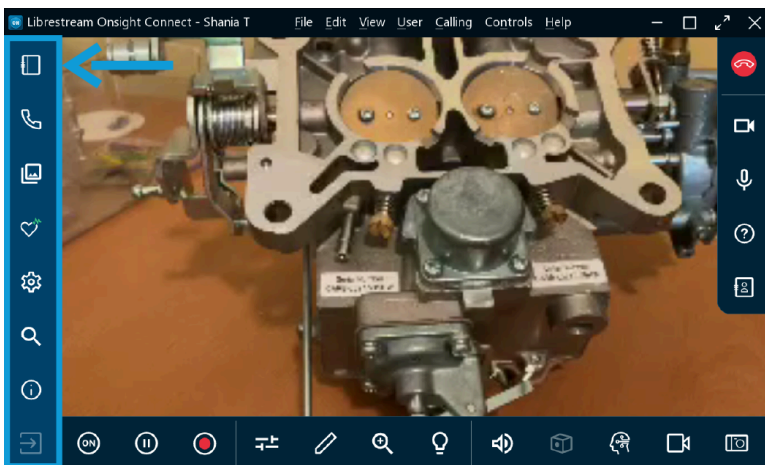








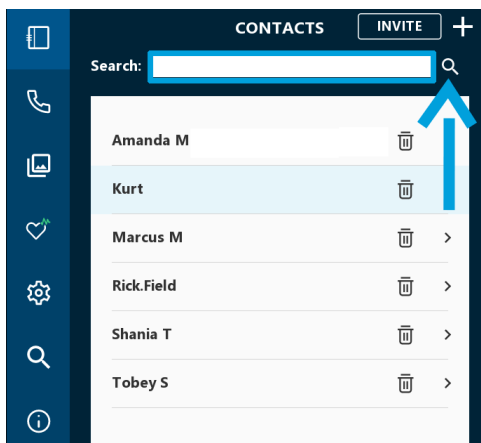



Figure 2-2 Left Toolbar




The **Left Toolbar** can also be referred to as a Dashboard. It provides a quick index to navigate between:



- **Contacts**  — Enables you to add contacts to your contact list, invite guests to participate in calls, track guest invitations, search for contacts within your global directory, and call a contact.
- **Call History**  — Enables you to examine recent calls that you participated in, explore details and files from each call.
- **Files**  — Enables you to explore **My Files** as well as browse local files and folders.
- **System Health**  — Enables you to examine your device's health as an indication of call quality.
- **Settings**  — Enables you to explore all Onsight Connect settings.
- **Search**  — Enables you to perform search operations based on keywords and date settings for **Calls, Images, and Recordings**.
- **Information**  — Enables you to access Onsight Connect's User Manual.
- **Logout (Exit)**  — Enables you to Logout (Exit) the Onsight Connect application.

2.1.1. Add a Contact



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

1. Click the **Search**  icon to display all contacts within your organization; or
2. Type the name of the contact in the **Search** field and the **Search**  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.

2.1.2. Call History

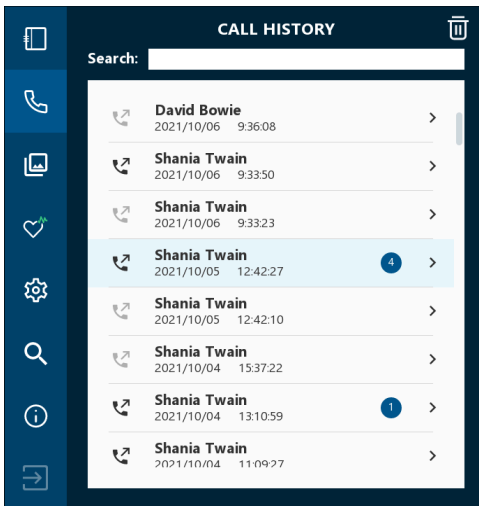





Figure 2-4 Call History

Select the **Call History**  button within the Dashboard to display a list of previous calls.

 **Note:** Calls are sorted by Date/Time and display the contact's name.

You can click the **Handset**  icon beside the contact's name to initiate a new call to that contact. Click the **Right arrow (>)** to view/edit call parameters that include **Summary**, **Participant**, and call **Properties** information.

2.1.3. Files

Manage Your Files

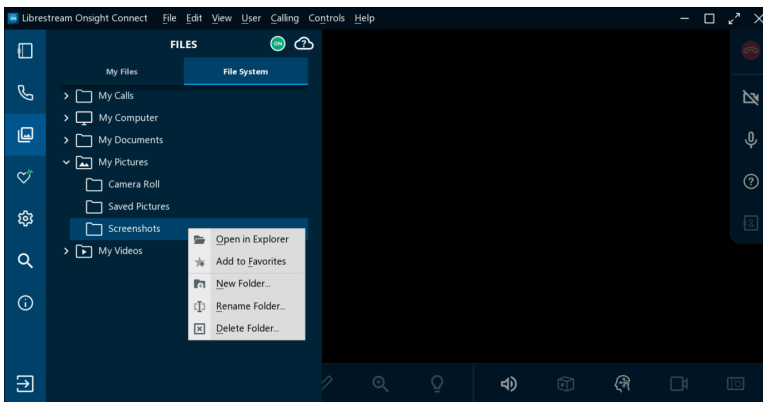




Figure 2-5 File Options

Click **Files**  to view and manage your files:

- **My Files** tab (PC, iOS, Android) displays all images and recordings sorted by the most recent date
- **File System** tab (PC's only displays) folders that include:
 - **My Calls**
 - **My Computer**
 - **My Documents**

- **My Videos**

-  **Note:** Click to expand folders and browse your local directories. Right-click a folder to: **Open in Explorer, Add to Favorites, Create a New Folder, Rename Folder** and **Delete Folder**.

- **Camera Roll** tab displays iPhone Operating System (iOS) pictures
- **Gallery** tab displays (Android) pictures

Enhance and Modify Media

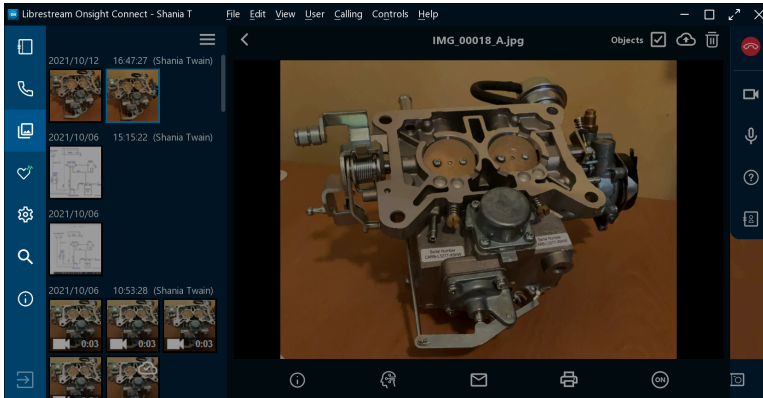











Figure 2-6 Enhancing and Modifying Media

Select an `image` or `recording` thumbnail to preview. When an image or recording is selected, you can:

- **Right-click** to **Rename, Delete, Upload, Save As, Email, Print**, or view its **Image Properties** by right-clicking the selection.
- For iOS and Android, touch and hold the image to access the pop-up menu where **Save As** is replaced by
 - **Save** (Image) to **Gallery** (Android)
 - **Save** (Image) to **Camera Roll** (iOS)
- Click the **Menu**  icon to **Select, Select All, Save to Gallery/Camera Roll, Delete** and **Email** files.
- Click **Properties**  to apply metadata to improve searching for: **Title, Description, and Keywords**
- Click **Computer Vision**  to apply labels using Artificial Intelligence (AI) functions
- Select **Email**  and to send the media in an email
- Select **Print**  to send the image to a printer
- Click **Share Video**  to display the file to all participants when you are in an Onsite call
- Select the **Objects** check box to display Computer Vision tags
- Select the **Upload to Workspace** **Upload to Workspace**  icon to upload the media to your CMS
- Select the **Delete**  icon to remove the selected media

 **Tip:** Smartphone can access their **Gallery** or **Camera Roll** from the **Files** panel. When sharing images from the Gallery/Camera Roll, file size is compressed to conserve bandwidth. Refer to the [Onsite High Resolution Image Guide](#) for details on sharing images in their native resolution.

2.1.4. System Health

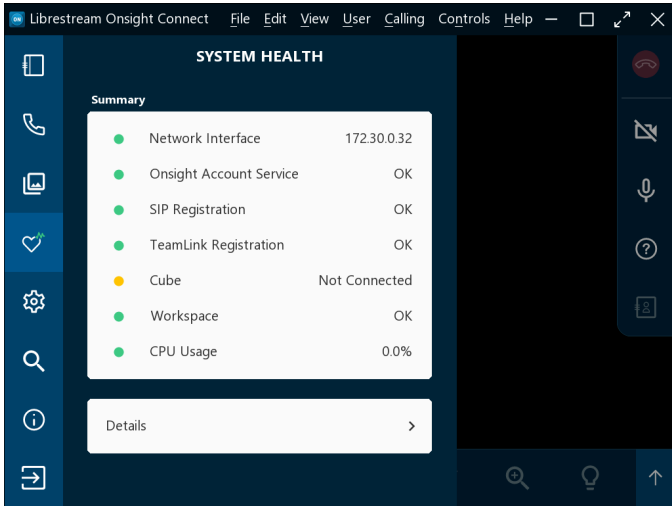




Figure 2-7 System Health

Click **System Health**  to generate a summary as an indication for call quality. The color of the System Health buttons provides a visual indicator. For example, when system health is **Green**, you can make or receive calls from anywhere. If any service displays as **Red**, please contact your internal Onsight administrator.

 **Tip:** The top four services must be green for you to make a call.

System Health settings include:

1. **Network Interface**
2. **Onsight Account Service**
3. **Session Initiation Protocol Registration (SIP)**
4. **TeamLink Registration**

2.1.5. Settings

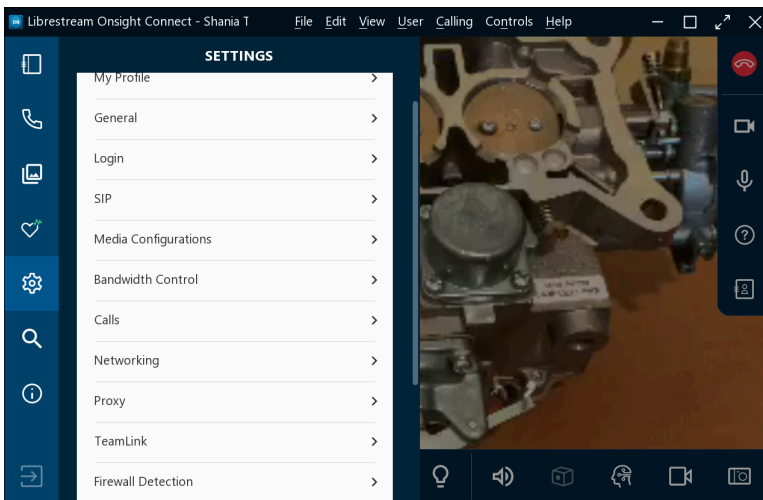




Figure 2-8 Settings

Settings are typically configured by your Onsight Connect System administrator. You can view your settings by clicking the **Settings**  within the **Left Toolbar** and selecting the right arrow (>) to view specific details. Settings categories can include:

- **My Profile**
- **General**
- **Login**
- **SIP**
- **Media Configurations**
- **Bandwidth Control**
- **Calls**
- **Networking**
- **Proxy**
- **TeamLink**
- **Firewall Detection**
- **Audio**
- **Workspace**
- **Software Updates**
- **Cube**

 **Note:** You can adjust the settings values as needed. The settings that display here can be controlled by your Onsight Platform Manager administrator.

2.1.6. Search

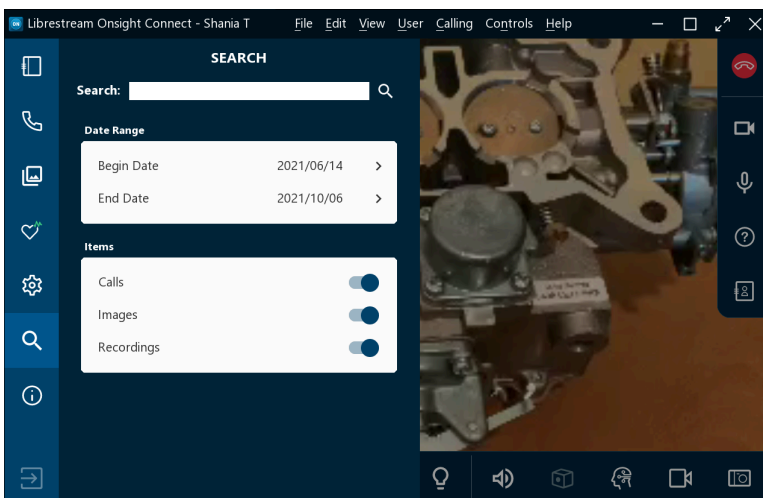



Figure 2-9 Search

Click **Search**  within the **Left Toolbar** to locate files that pertain to specific Onsight Calls, Images and Recordings. Enter text within the **Search** field as criteria for the search. For example, enter:

- A person's name as the Author
- Terms that correspond to metadata for Title, Description, and Keywords

Click the **Search**  icon to view results.

2.2. Right Toolbar

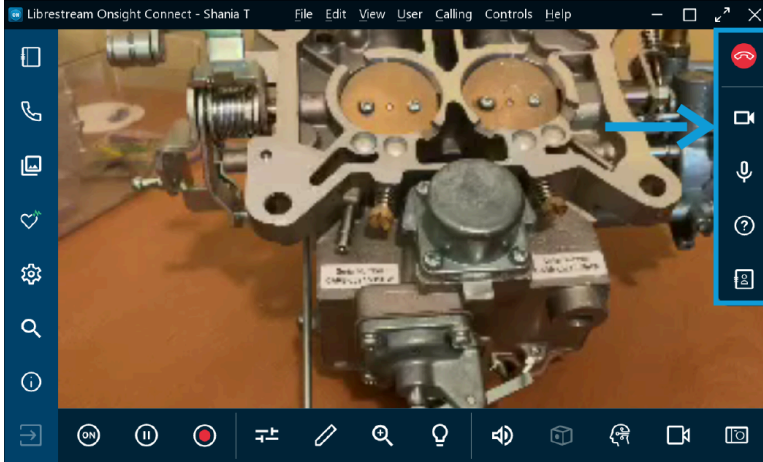











Figure 2-10 Right Toolbar

The **Right Toolbar** is comprised of the following functions:

- **Hang Up**  — Enables you to hang up and exit a call.
- **Tip:** If you are not on an Onsite call, the **Hang Up**  icon will display as inactive.
- **Enable/Disable Camera**  — Enables you to turn On/Off camera display. If camera display is Off, Onsite Connect will show black within the collaboration window.
- **Mute Microphone**  — Enables you to **Mute/Unmute**  your microphone
- **Tool Tips**  — Enables you to display names for key functions within Onsite Connect.
- **Participants**  — Enables you to identify all participants and click to enable **Share Video**  for any participants on the call. You can also **Delete All Telestrations**  for a participant.

2.2.1. Indicators and Warnings

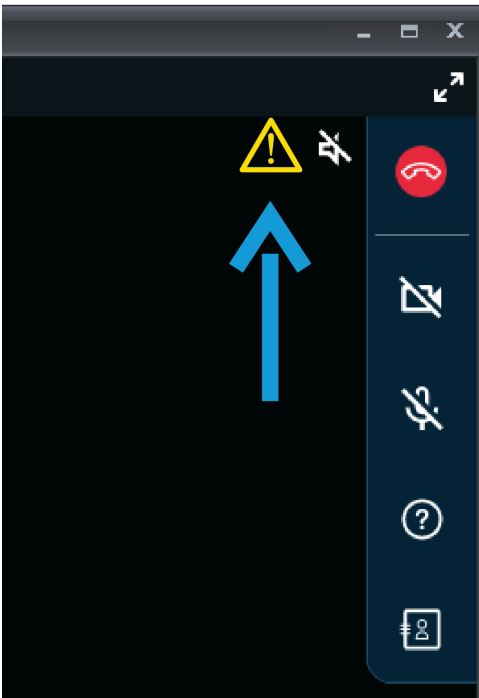






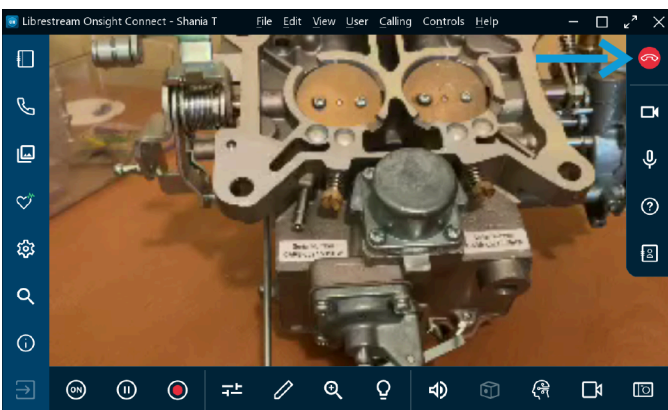



Figure 2-11 Indicator and Warning Location

Occasionally, Indicators and Warnings may appear next to the **Hang Up**  button within the **Right Toolbar**. These Indicators/Warnings represent the current status when you are working with illumination, recording, video and audio operations. Warnings can also indicate a problem with a call. To view a summary for the warning, tap or click the Warning message or icon.

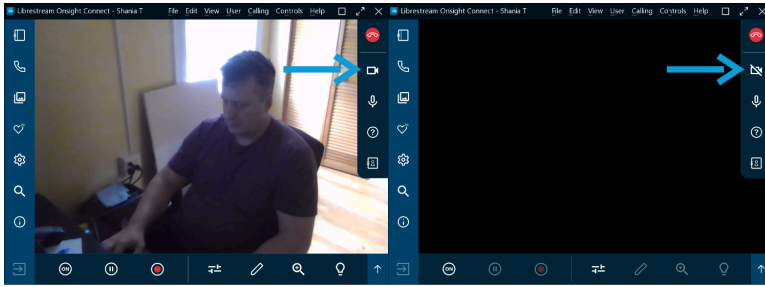
-  **Tip:** OnSight only displays an indicator if the default status has changed. For example, a red recording light only displays if someone is recording the session. The microphone indicator only appears if the microphone is muted.
-  **Note:** If you try to share video from a participant that has **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.
-  **Note:** If the **Transcription**  icon appears next to the **Hang Up** button within the Right Toolbar, then the recording is being transcribed.



2.2.2. End a Call





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

2.2.3. Enable/Disable Camera



Enable/Disable Camera  — This function enables you to turn On/Off camera display. If the **Disabled Camera**  function is active, Onsite Connect will show black within the collaboration window.

 **Note:** When you are not in an active call, your camera can be enabled to display within the collaboration window. If a call starts, your camera can be activated by you or other call participants using the **Share Video**  buttons.

2.2.4. Tool Tips

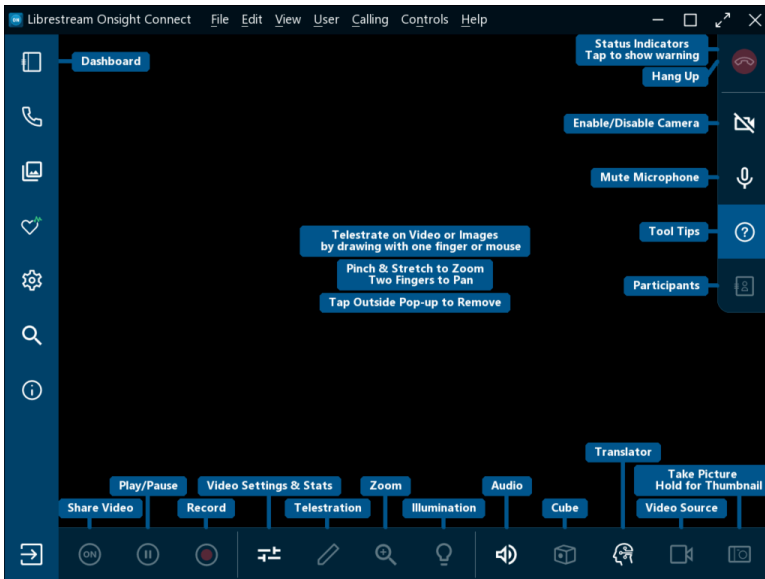







Figure 2-14 Tool tips



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

2.2.5. Participants Panel



Figure 2-15 Participants Panel

Click the **Participants**  icon within the **Right Toolbar** to access the **Participants Panel**. The Participants panel enables you to select a user's camera to display when in a call. You can also **Mute** the microphone  for a participant; and **Delete All Telestrations**  for any participant on the call. To display a user's camera for viewing within a call, select the **Share Video**  button beside that participant's name.

 **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.

2.3. Bottom Toolbar

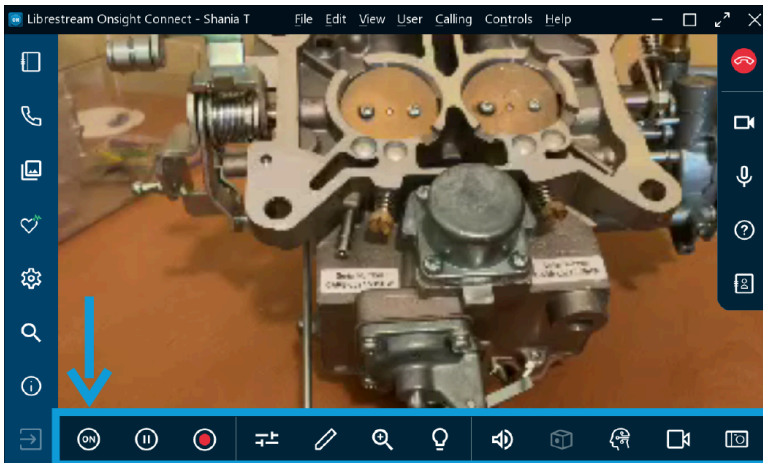













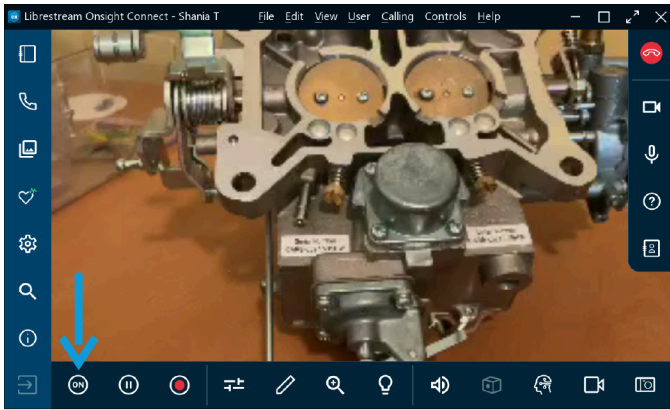





Figure 2-16 Bottom Toolbar


The **Bottom Toolbar** is comprised of the following functions:




- **Share Video**  — Enables you to take control and make your camera the active camera for the call. The **Share Video**  button will change color and glow when you are actively sharing
- **Pause**  — Enables you to stop any video playback in the collaboration window
- **Record Video**  — Enables you to record content displayed within the collaboration window
- **Video Settings & Stats**  — Enables you to view and modify your **Audio/Video**, **Connection Status**, and **Stream Status**
- **Telestration**  — Enables you to draw shapes (Telestrate) onscreen within the collaboration window
- **Zoom**  — Enables you to access the Zoom slider where the level of magnification (Zoom) can be adjusted
- **Illumination**  — Enables you to turn On/Off your device's **Flashlight**.
- **Audio**  — Enables you to mute **Conversation Audio** and **Playback Audio**
- **Cube**  — Enables you to access cube functions when available
- **Translator**  — Enables you to access natural language processing capability
- **Video Source**  — Enables you to control the video source for the device. This can be one or more cameras depending on the device
- **Take a Picture**  — Enables you to take a picture with the camera and share it

2.3.1. Step 7: Share Video



When you are in an active Onsite 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.

 **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.

2.3.2. Pause/Play Video

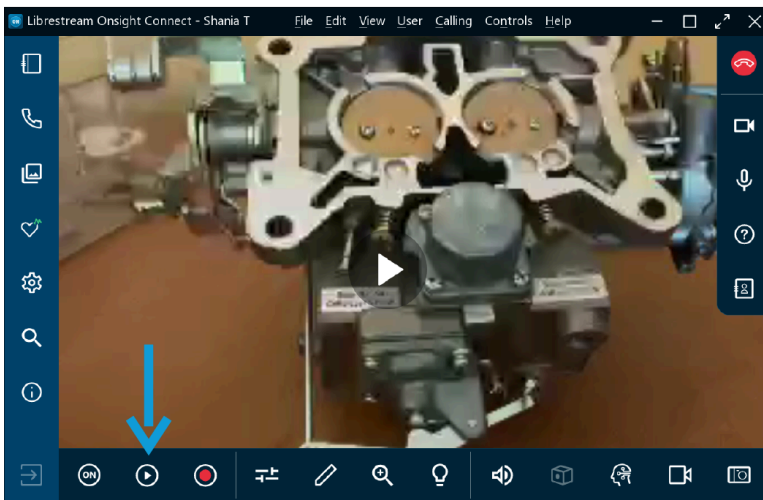







Figure 2-18 Pause/Play Video

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 **Pause** .

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

2.3.3. Record

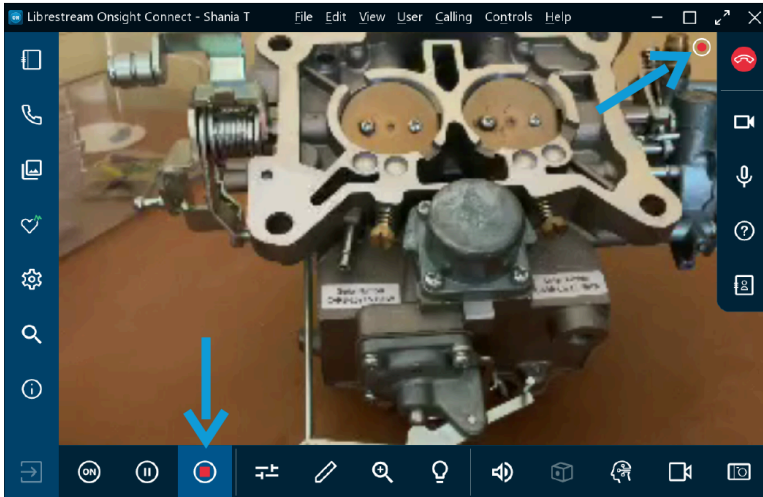






Figure 2-19 Recording Live Video

Click the **Record Video**  icon 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.

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

2.3.4. Video Settings & Statistics

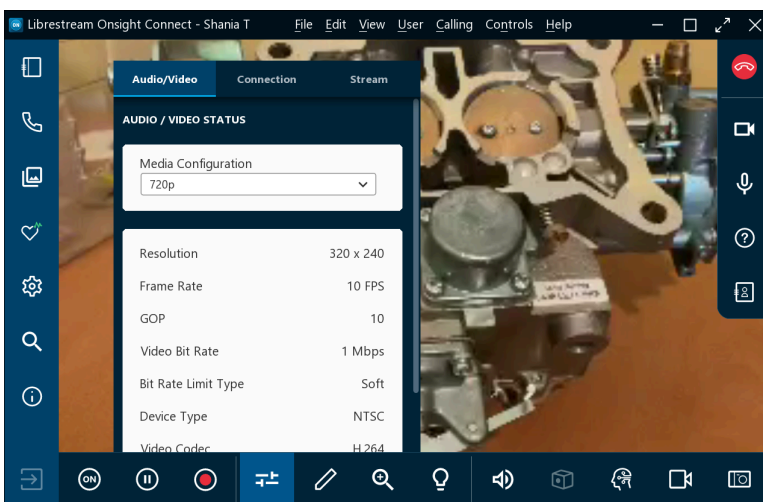



Figure 2-20 Video Settings & Statistics

Select **Video Settings & Stats**  to change your video settings, run a Bandwidth Test, or view call performance statistics. There are three tabs available:

- **Audio/Video Status** — Enables you to display the active Media Configuration as well as a list of the alternate Media Configurations

i **Tip:** If you are experiencing choppy video or audio, you may not have sufficient network bandwidth to support your current media configuration. Consider selecting a **Media Configuration** that uses less bandwidth. If you don't know what to choose, select **Calling > Test Bandwidth** from the **Main Menu**. The results will recommend an appropriate media configuration for your session.

- **Connection** — Enables you to display your connection status for SIP and Calls.
- **Stream** — Enables you to display your **TRANSMIT STATISTICS, RECEIVE STATISTICS, and LOCATION** results

2.3.5. Telestration

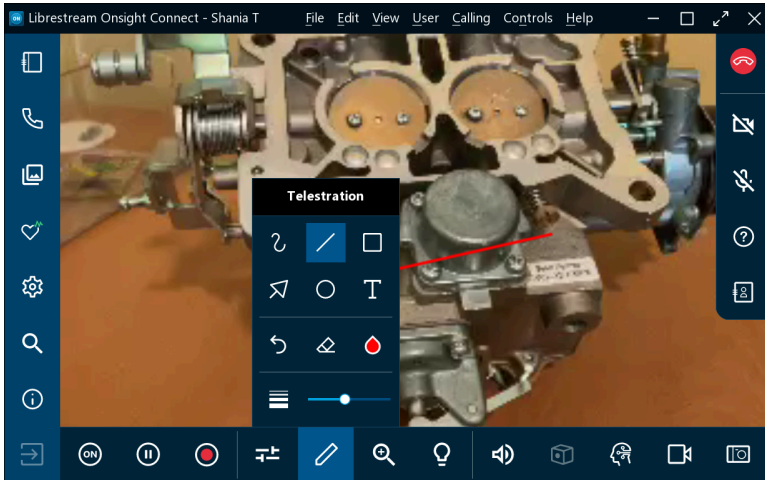












Figure 2-21 Accessing Telestration Options

Telestration enables 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 that include:

- **Freehand**  — Enables you to sketch and draw irregular lines
- **Line**  — Enables you to draw straight lines
- **Rectangle**  — Enables you to draw rectangles
- **Arrow**  — Enables you to add directional arrows
- **Circle**  — Enables you to draw circles
- **Text**  — Enables you to add text labels
- **Undo Telestration**  — Enables you to undo the last telestration
- **Telestration Color**  — Enables you to define a single color for your telestrations
- **Telestration Line Thickness**  — Enables you to apply a line width to all telestrations by clicking and dragging the slider.

i **Tip:** Consider pausing the video before you telestrate onscreen.

2.3.6. Zoom

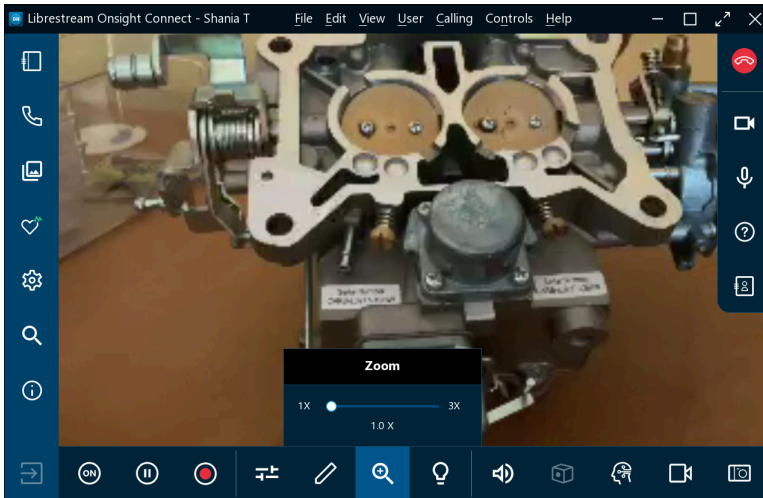




Figure 2-22 Accessing Zoom Options

You can increase the level of magnification by accessing the digital zoom function by clicking the **Zoom**  icon within the **Bottom Toolbar** and dragging the slider to increase magnification. During a call, all participants will see the effects of the zoom. If you are viewing video from another Onsite participant, you can remotely zoom in using their camera.

 **Tip:** On a PC, you can right-click with a mouse and drag to **Pan** (Move) a zoomed video image

Mobile Zoom Features

On a mobile device (Android, iOS), you can also:

- **Zoom out** by pinching and dragging two fingers together onscreen
- **Zoom in** by pinching and dragging two fingers further apart onscreen
- **Pan** (Move) a zoomed video/image by dragging with two fingers

2.3.7. Illumination

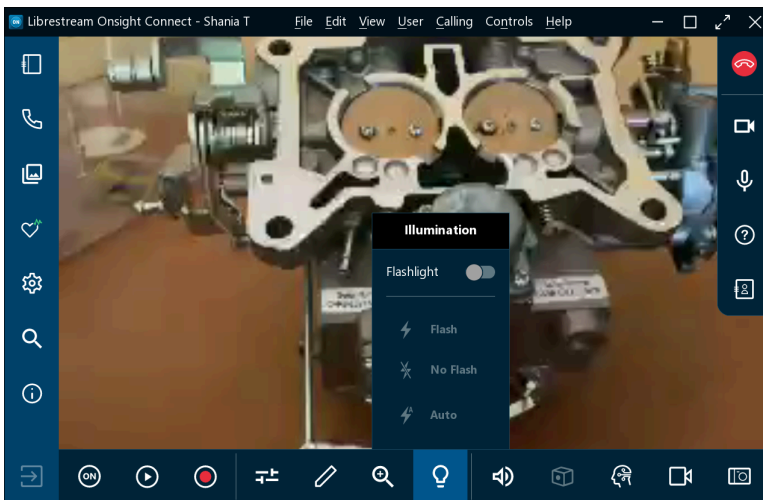



Figure 2-23 Accessing Illumination Options

Illumination enables you to improve lighting conditions during a call. Illumination options can vary depending on the device you are using. If you are sharing, viewing, or recording video on your mobile device or tablet, you can typically turn the **Flashlight On** or **Off**. Additional options for pictures include **Flash** (On), **Auto** (Automatic Flash) when required in low lighting conditions and **No Flash** (Off).

 **Note:** Typically, there is no flash option with most Onsight devices.

2.3.8. Audio

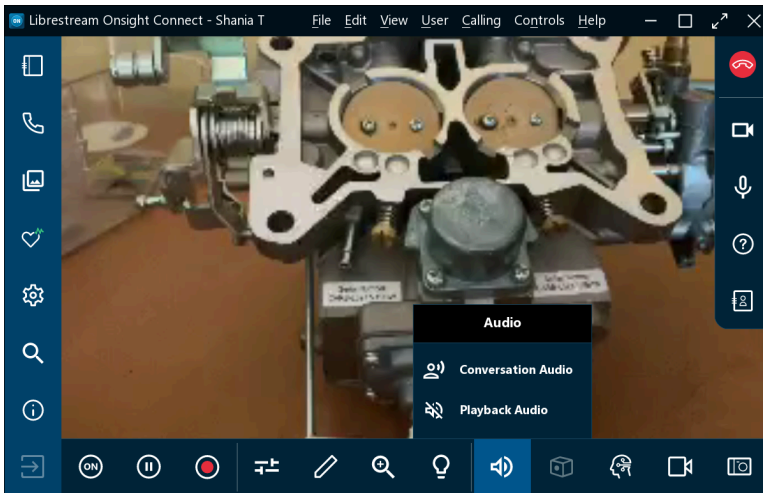





Figure 2-24 Audio Options


Select **Audio**  from the **Bottom Toolbar** to explore options for muting sound for:

- **Conversation Audio:** This is the main audio channel for all Onsite Participants — If you mute this, you will not hear the other Onsite participants
- **Playback Audio:** If you are streaming video or watching an Onsite recording — This option will mute the audio stream from the video source or recording

 **Note:** You will still hear the main Conversation Audio. However, **Audio**  must be enabled on the video source device for Playback Audio to be included in the live video stream or recording.

 **Tip:** Do not enable **Conversation** and **Playback Audio** at the same time as it can result in an echo effect.

- **Mute Microphone** : Click to mute your own microphone — The other Onsite Participants will no longer hear you

 **Tip:** You can also mute the speaker using the standard smartphone or tablet buttons.

2.3.9. Translator

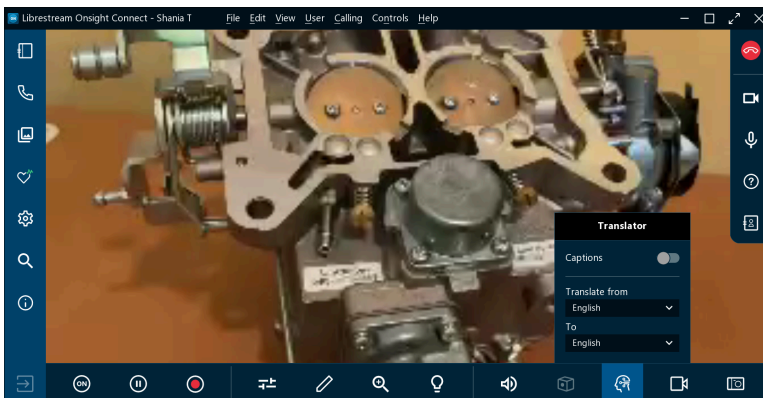



Figure 2-25 Onsite Translator Options

Onsight Translator enables Onsight Connect to perform real-time speech-to-text translations and displays them as captions in the collaboration window. Onsight Translator uses Natural Language Processing (NLP) AI services. Onsight Translator enables you to control:

- **Captions:** Enables speech to text to display within the collaboration window — Conversation audio is translated from the source language to the destination language you define
- **Translate from** (Language): Enables you to define the source language you are hearing
- **To** (Language): Enables you to define the destination language to translate to

 **Note:** The Onsight Translation services are managed by your Onsight Platform Manager administrator through the AI settings in your domain. Your administrator can enable the Onsight Translator for groups or individual Onsight Connect users through client policy. Librestream can work with you to develop a trained NLP model that includes terminology specific to your use case and company.

2.3.10. Video Source

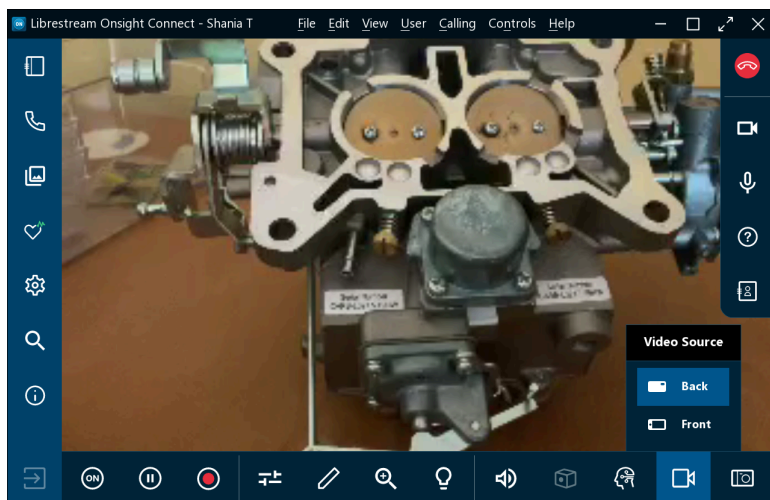




Figure 2-26 Video Source Options

Click the **Video Source**  icon within the **Bottom Toolbar** to change the video source for the call. For example, when the live source is a smartphone, you can usually select between the **Front** and **Back** cameras, depending on your device and the number of cameras it supports. When a smartphone is paired with an **Onsight Cube** you can select between **Cube**, **Thermal**, or **Fusion**.

 **Tip:** The list of video sources represents a list of cameras for a single Onsight endpoint for the user who is streaming video. The options available will vary for each participant who becomes the video source. If you are not in a call, your list simply contains the camera options for your Onsight end point.

If the live source is an **Onsight Rugged Smart Camera**, you can select between the Onsight camera and an external third-party video device such as a **Bore scope** or **Microscope**. This third-party device is attached using the **S-video** port on the Onsight mobile device. If the live source is an **iOS** device with an attached **Onsight Collaboration Hub**, then you can select between **Front**, **Back**, and **Onsight Hub** as the video source.

2.3.11. Take a Picture

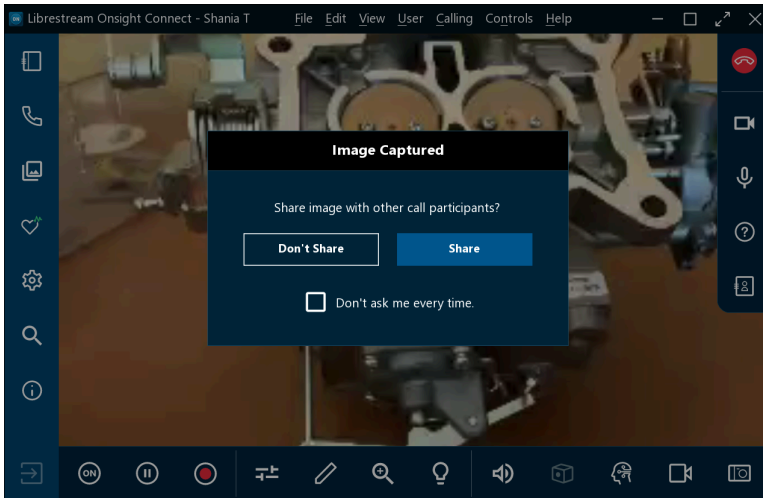




Figure 2-27 Take a Picture Options

Click the **Take a Picture**  (Camera) icon within the **Bottom toolbar** to take a photograph. The snapshot will be taken using the device that is sharing the live video source.

All pictures are saved as a Joint Photographic Experts Group (JPG) image and can be located by clicking **Files**  icon within the **Left Toolbar**. During a live call, an **Image Captured** window appears asking if you want to "Share image with other call participants?" You can select the **Don't Share** or **Share** option as necessary, and you can disable this message from appearing in the future by enabling the **Don't ask me every time** check box.

Hold to Share

You can also bypass the prompt for sharing by clicking and holding the **Take a Picture**  icon down for three seconds. This action immediately shares the picture with all participants.

Share High-Resolution Images


When you take and share a picture, you are sharing a high-resolution version of the picture with all participants. For more information on how to configure your device to take high resolution pictures, please refer to the [Onsight High Resolution Guide](#).

Copy to Captured Images Gallery/Camera Roll:

Smartphones automatically store captured pictures to their **Gallery** (Android) or **Camera Roll** (iOS). For more information on storing images, please refer to the [Onsight High Resolution Guide](#).

2.3.12. Focus

Onsight supports **Auto Focus** mode on all camera devices. The **Manual Focus** option is only available if you are in a call with an **Onsight Rugged Smart Camera**. When using an Onsight Rugged Smart Camera, select the **Manual** option to remotely control the Onsight device. To return to **Automatic Focus**, select **Auto**.

 **Note:** Manual focus is not available when the live video source is a Smartphone or Tablet. These devices only support **Auto Focus**.

3. ADVANCED OPERATIONS

Advanced operations include:

- Using the Snip Tool to share content (Windows only)
- Inviting Guests (Inside/Outside) your organization to participate in calls
- Hosting a multiparty conference call

3.1. Snip Tool

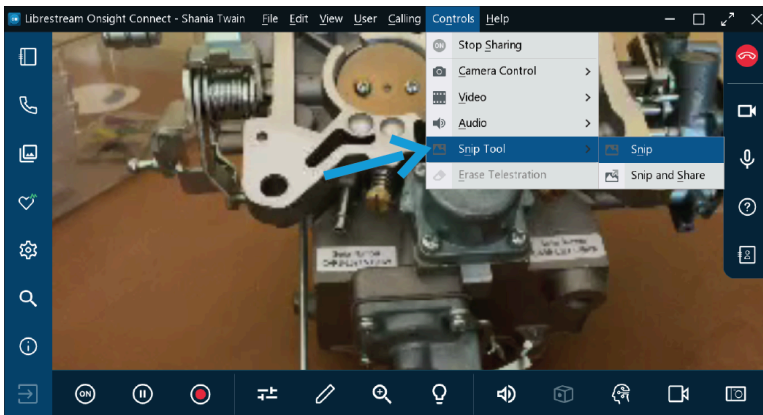




Figure 3-1 Accessing the Snip Tool

Onsite Connect for Windows includes a **Snip Tool** for taking screen captures and sharing them in Onsite Calls. Using the **Snip Tool**, teams can quickly share a snapshot of a PC screen displaying content from product manuals, schematics etc. You can access the **Snip Tool** from the **Main Menu** by clicking **Controls** > **Snip Tool**. The following options are available:

- **Snip Tool:** Enables you to take a screen shot and save the image — Thereafter the image is available by accessing **Files**  from the **Left Toolbar**
- **Snip and Share:** Enables you to take a screen shot and share the image immediately with all participants

 **Note:** As a best practice, you should have your resource (product manual, schematic, image) open and ready within a window behind Onsite Connect application prior to activating the Snip tool.

- Define your **Snip Tool** options for capturing the image as:
 - **Select Window:** Enables you to select a window to define the size of the image
 - **Select Rectangle:** Enables you to manually draw a rectangular region to define the area to capture
 - **Full Screen:** Enables you capture everything on your monitor

3.2. Invite a Guest

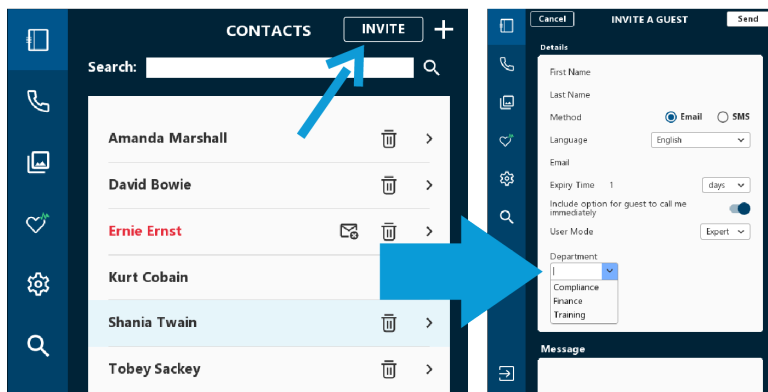



Figure 3-2 Guest Invitation



Guest Invites enable you to collaborate with contacts that do not have an Onsite account. For example, you want to have an Onsite video call with a third-party parts supplier to investigate a problem. In this case you can issue a temporary guest account to the supplier.



To invite a guest, click **Contacts**  and click **INVITE**.


Guest invitations can support:

- **Languages** — Select from English, French, Chinese, Japanese, German, Italian, Portuguese (Portugal and Brazil), Swedish, Russian, and Korean languages
- **Expiry date** — Invitations can be set to expire within a defined time frame (Days)
- **Email** or **Short Message Service (SMS)** as a delivery method
- **Expert** or **Field** mode — You can use **Expert** mode for guests with prior Onsite Connect experience, and use **Field** mode for guests with limited Onsite Connect experience.

 **Note:** The capability to select **Expert** or **Field** mode is controlled by your **Client Policy** settings. Contact your Onsite Administrator to review as required.

 **Tip:** When a guest is operating in **Field Mode** and they are sharing/streaming video content, the **Share Video**  icon will display as a status indicator, next to the red **Hang Up** icon.

- **Custom Field(s)** (Option) — Custom Fields enable you to learn more about your guests and improve reporting data. Use the drop-down menu to select a custom field for the guest invite or enter text to dynamically filter the list options as you type.
- A **Status** indicator — A **Sent**  icon displays when an invitation is sent; a **Read**  icon can display when the invitation has been read, if this option is supported by your email/sms provider.

 **Note:** In order to create guest invitations, this service must be enabled for your account.

3.2.1. Inviting an External Guest

In this procedure, a host will invite a guest to join your Onsite session. In order to invite a guest, you must:

1. Click the **Contacts**  button within the Dashboard.

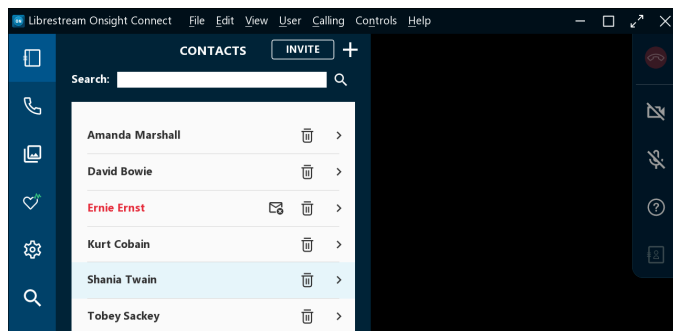


Figure 3-3 Accessing Contacts

2. Click the **INVITE** button. The INVITE A GUEST window appears.

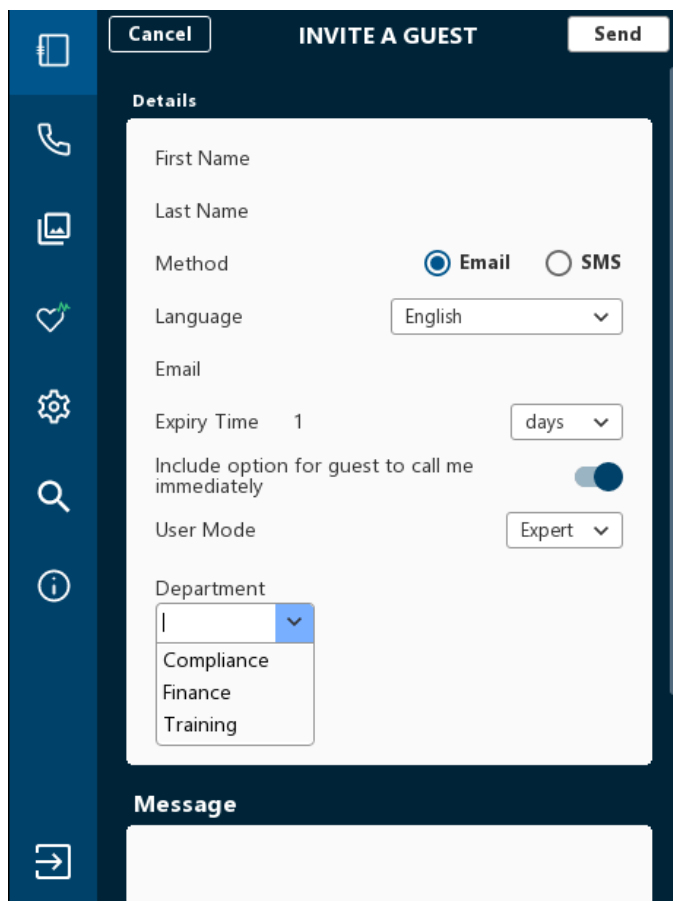



Figure 3-4 Preparing a Guest Invite

3. Enter contact information within the **First Name**, and **Last Name** fields.
4. Select the **Method** for delivery of the invitation:
 - **Email** — To send the invite by email
 - **SMS** — To send the invite by a text message
5. Select the **Language** drop-down menu to specify the default language for the invitation. For example, select **English**.
6. Enter the **Expiry Time** (days).

 **Tip:** Unless otherwise specified, the sent invitation will expire after one day.

7. Depending on your selection for Step 4, you will see:

- **Email** – Enter the email address for the recipient
- **Phone Number** – Enter the Country Code + Area Code + Phone Number for the recipient.

8. Click to enable the **Include option for guest to call me immediately** as required.

9. Define the **User Mode** from the drop-down menu. Select from:

- **Expert**
- **Field**



Note: The capability to choose between Expert or Field User mode must be enabled for your account by your Onsite Administrator.

10. (Optional) Select a category from within the **Custom Field** drop-down menus to improve the quality of your reporting data, as necessary.



Tip: Enter text within the **Custom Field** to dynamically filter the list options as you type.

11. Enter text for a greeting within the **Message** window.

12. Click **Send** when the invitation is complete.

A message appears stating that "A guest account has been created and an invitation has been sent to..."

13. The Guest will receive an email or text message that will prompt them to:

a. **Launch Onsite Connect** using the Web App.

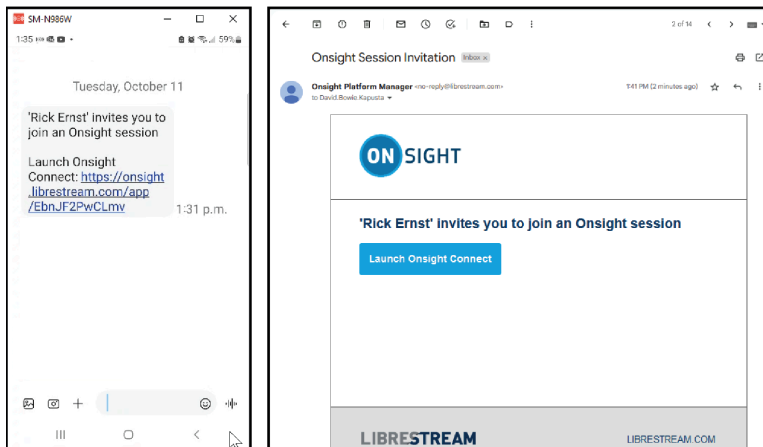


Figure 3-5 Guest Invitation (Smart Phone/Windows Examples)

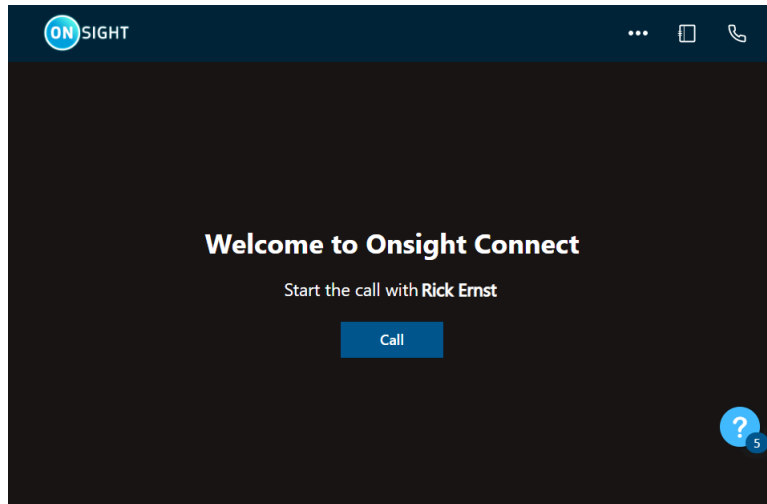
14. Click the link or button to **Launch Onsite Connect**.

15. Select your preferred browser as: **Chrome, Safari, Firefox, or MS-Edge**.



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.

16. If prompted, change your password, as necessary.



17. Click the **Call** button to start the call.

i **Tip:** Consider adding a bookmark in your browser for the **Web App** domain to speed up the login process in the future.

This completes the procedure.

3.3. Multiparty Conference Calls

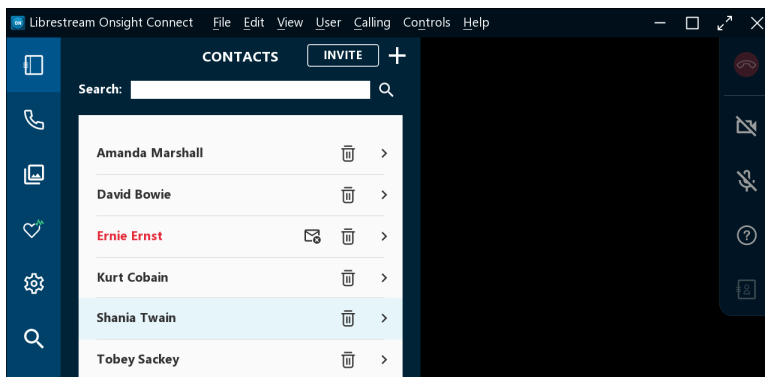


Figure 3-7 Multiparty Conference Call

Onsight multiparty calls can include more than two participants. All participants in a multiparty call hear the same audio, see the same video, and can collaborate on the video using telestration.

A multiparty call must be initiated from a Windows Personal Computer (PC) or Android device running Onsight Connect. The windows PC/Android device must be the Host for the call.


i **Tip:** The conference host requires a high bandwidth internet connection. You should use the Windows PC/Android endpoint with the best wireless or wired network connection as the host for a multiparty conference call.

The windows PC/Android device that makes the first call of the conference becomes the 'Host' for the conference call. Once the initial call is established between the Host and any other Onsight client, then the Host can add additional participants to the call. The number of participants that can join the call is dependent on the Host's **Maximum number of connections allowed** setting under **Settings > Calls**. This can also be controlled by **Client Policy** settings configured by your Onsight Administrator. For a Windows host, we suggest up to five participants in a conference call, while for Android devices, up to three.


i **Note:** Regardless of the maximum number of connections allowed, the host device must be able to support the bandwidth and processing overhead associated with the number of participants in the call. That is, it must have the system resources to support the call.

i Tip: If you are unsure, you can check the **CPU usage** for your device under **System Health** to see if the host device can support adding multiple participants to a call

3.3.1. Hosting a Multiparty Conference Call

Check that you are using a stable/reliable wireless or wired network connection when selecting the PC/Android device that will be the Host in a multiparty call. Verify that **System Health**  is green for all participants, before proceeding.

To host a multiparty call, you must:

1. Start an Onsight call from a Windows PC.
2. Click **Contacts**  and select a contact's name to initiate the conference call.

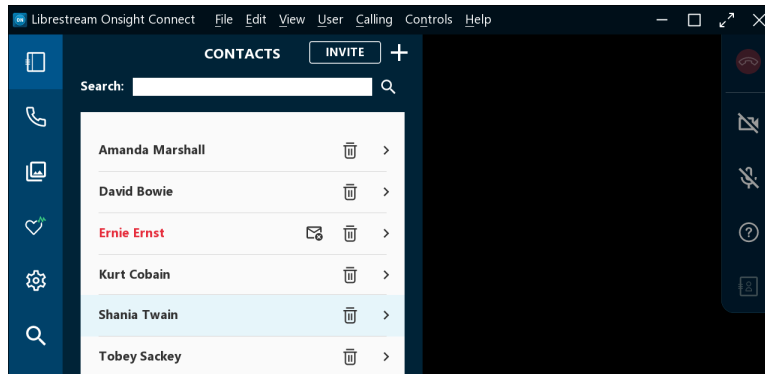



Figure 3-8 Select a Contact's Name to Initiate a Call

3. You can add a second participant to the call by either selecting another contact from the **Contacts list** or by sending an **External Guest Invite**.
4. Once all participants have joined the call, click **Participants**  within the **Right Toolbar** to see the list of Participants that are on the call.

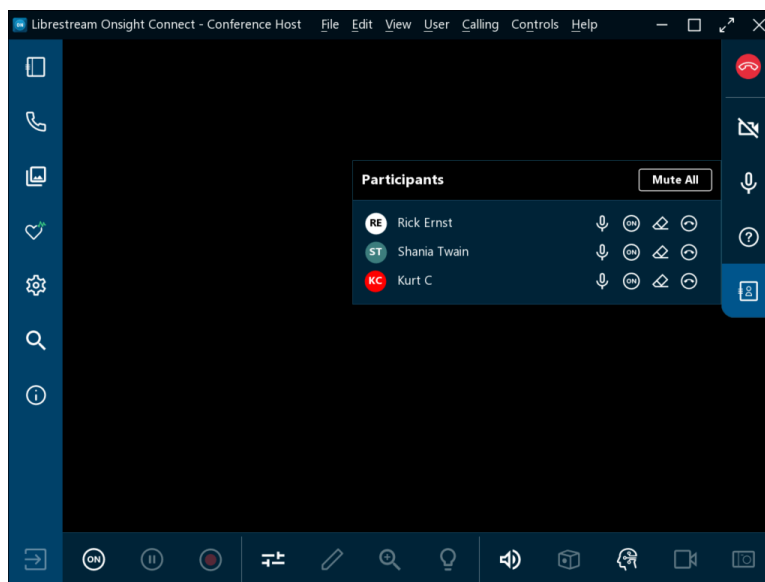




Figure 3-9 Participants Panel

5. Identify the participant who will be sharing the video as your video source.

6. Click the **Share Video**  icon next to the participant's name to start sharing video.



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.

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