Quickstart Guide

Webinato
by
Omnovia Technologies
(www.webinato.com)

webinato
No.1 in Webinar Automation

Webinato QuickStart Guide

A word from the CEO

Hi,

Welcome to Webinato — the 4th generation release of the smartest online media platform you can use for hosting exciting and 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 multimedia 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 configure 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 need to host more exciting, more engaging, and hopefully more successful online events. This quick start guide will walk you through how to administer and host a Webinato room/session in a few easy steps on the fly. 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 for 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 least thank you for providing us the opportunity to serve you.

Best,
Belal Atiyya
CEO

A Few Useful Information

Summary

This guide is designed to be used by web conference Admins and Moderators (a.k.a. Organizers). The purpose of this document is to describe the functions available to them on the admin portal.

Quick Tour on Webinato Desktop Application

Webinato is no longer a web-based application and requires a software installation in order to,

- Join the webinar room,
- Manage events.

The application is available for Windows, Mac OS, and Linux Platforms. A full installation guide is available at *https://support.webinato.com/support/solutions/articles/12000072128*

Webinato Application FAQs: *https://support.webinato.com/support/solutions/articles/12000072914*

Known Issues: *https://support.webinato.com/support/solutions/articles/12000072917*

How Do I Find Access Links?

There are two methods for a Moderator to gain access to a web conference room. There is a direct access link or through SSO (Single Sign On) if it is implemented on your website. Please refer to the Administrator Guide for additional information on setting up SSO (Single Sign On). The direct link will look something like *https://yourCompanyName.webinato.com/room1/presenter*

> *Tip: Here, yourcompanyname should be replaced with your account (subdomain).*

To Find Access Links…

- Log into the admin page by visiting *https://www.webinato.com/members/members.php* and signing in
- Go to either Quick Links at the top or click the *View Access Information (Login)* link.

A Few Useful Information

Getting Technical Support

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 at +1 415.394.8010 x2

Important: We will help you with setting up the Screen Sharing Software anytime, upon request.

Other Guides

- QuickStart Guide on Events: *https://www.webinato.com/sc/WebinatoEventGuide.pdf*
- Administrator's Guide: *https://www.webinato.com/sc/WebinatoAdministratorGuide.pdf*
- Moderator's Handbook: *https://www.webinato.com/sc/WebinatoModeratorsHandbook.pdf*
- Attendee's Guide: *https://webinato.freshdesk.com/support/solutions/articles/5000601863*

A Few Useful Information

How to Use the Knowledgebase and Technical Support Portal

The customer support link is embedded in your Admin Portal as well as in the Webinar room.

- On Admin Page (upper-right, next to the profile)

  ? Support

- In the Webinar room, click the help icon (?) and then the *Open Support Portal* link.

  ? Help

  Please click on the choices below

  Tutorial Mode OFF

  Open Support Portal
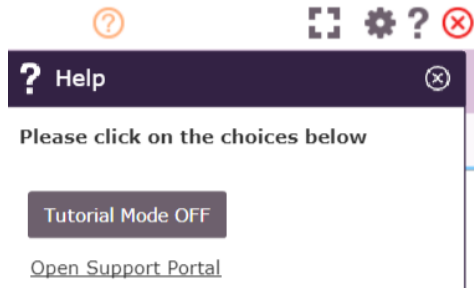
- In the Webinar room, if the tutorial mode is on (turn on using the "?" to get the help panel), click one of the self-learning tooltips ⑦

How to Get Help

- Search the portal for comprehensive guides with videos. If an answer is not available,
- Make a call using the number given there,
- Click the chat icon on the left to contact real-time agents (from 6 AM to 8 PM CT),
- Create a ticket,

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Phone & Email Support: Mon. - Fri. 8 AM - 5 PM US Central
+1 415.394.8010 x2

Live Chat Support: Mon. - Fri. 6 AM - 9 PM US Central

Phone contact

ALERT

If you are new to Screen Sharing, it needs to be patched. Find the script below.

Click HERE for more information about a workaround. This works on Windows 8/10. If this does not work or if you use Windows 7, please contact us.

Alerts and announcements

Windows 11

Windows 11 is here. Please follow this article to know what you need to do if you upgrade or use a new computer with Windows 11!

Create a ticket

Search Bar

SEARCH

Create A Support Request

I Am an Organizer

Articles and Categories

I Am a Presenter

- I can't access the webina
- Setting up the webinar ro

- I can't access the webinar as a Presenter
- Microphone, phone, or other audio questions

Chat Support

Overview

In this document, we will explain how to put on your first webinar in 5 steps.

Step 1 - Getting Started

Admin Portal: Personalize the Webinato platform by adding a logo, creating a custom URL for your company, and a few more housekeeping items

Step 2 – Setting Up User Roles and Managing Accounts

Set up additional roles and assign permissions

Step 3 – Selecting the Webinar Access Options

Select the best method to provide access to your clients

Step 4 - Setting Up Your Webinar Room and Moderating like a Pro

Customize your webinar room look and feel, as well as upload content, and how to start a webinar room, moderation, and end a session

Step 5 - After the Session…

Collect data and manage your recordings for encore presentations

Step 1 – Getting Started

First, let's log in and go to your Admin Page (located at yourcompany.webinato.com/adminpage) as the first user (Super Admin). Then we will modify a few organization settings and room settings.

Login In to the Admin Portal

webinato
more engaging webinars

Sign in with your email and password to configure your rooms, create events, manage your subscription, see reports …

Email

password

Forgot your password?

Sign In

Type your email

Type your email

Reset your password: Super admins/organizers/presenters/billing contacts and registered users only

First look at your webinar admin portal

YOUR LOGO

Logo

Technical Support

Support   Thanhda Lasitha

Profile

Quick Links:
Access My Rooms   Modify Room Settings
View Room Usage Reports   Manage Events

Quick Access

Account

Account Options (Visible only to Super admin and billing contacts – billing link)

⚙ Modify Organization Settings $ Billing
                                          Your billing cycle ends in 1116 days.   learn more

🏛 Modify Account Status

Rooms Management

⚙ Modify Room Settings   📋 View Room Usage Reports

👤 Manage Users   ⓘ View Access Information (Login)

📅 Manage Events

AutoPilot Management

Room Management/Event Management/Autopilots: Visible to super admins and organizers/presenters with extended admin rights

⚙ Modify Settings   📋 View AutoPilot Reports

↻ Manage AutoPilots   ⓘ View Access Information

Step 1 – Getting Started

Account

⚙ Modify Organization Settings

ATTENTION PLEASE

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

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

What you can do with these settings

Update Organization Settings

Organization name :	ⓘ	DisneyLand ①
Location :	ⓘ	1313 S. Harbor Blvd. Anaheim, CA 9
Short Link :	ⓘ	http:// disneyland .webinato.com This short link is available. ②
Main Contact :	ⓘ	③
Name :		Joe
Email :		Joe@disney.com
Phone :		(714) 956-6425
Customer Support :	ⓘ	④
Website URL :		https://disneyland.disney.go.com/help/phone/
Website Label :		
Email :		Joe@disney.com
Phone :		(714) 520-6222
Logo :	ⓘ	Choose File
	⑤	YOUR LOGO
Website :	ⓘ	https://disneyland.disney.go.com test it

⑥

Step 1 – Getting Started

1. The *organization 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.

3. The *main contact* gets all the emails from Webinato, including updates and billing statements/invoices. So, be sure to add the specific person's contacts.

4. *Customer support contact* is the one that is displayed to anyone who is having trouble using your services on Webinato. Adding all the details can save the customer during difficulties.

ATTENTION PLEASE

Do not add Webinato customer support contacts as the customer support contact.

5. The *logo* and its *link to your website* can be added here. When someone clicks the logo, he/she will be taken to the webpage you specify here.

6. Click the tooltip for a descriptive explanation.

FUN FACT

Always use Tooltips ⓘ *to learn what the option and what it does*

ATTENTION PLEASE

Important: When setting up your account, be sure to set Time Zone and Time Format. Get to *Close Room After* under the *basic room settings* (page 13).

Step 2 – Setting Up User Roles and Managing Accounts

Let's set up some user accounts and roles. First, let's spend a few minutes identifying and understanding Webinato user roles and permissions.

A Brief on User Types and Roles

User Roles

- *Super Admin*: The all-powerful user who has access to all the sections on 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 for 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 can 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).
- *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 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.

Only a super admin can change the webinar room color scheme!

A presenter cannot modify room settings, send announcements, start recording as well. No pain of accidental modifications anymore!

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*.
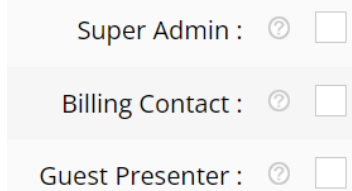
Step 2 – Setting Up User Roles and Managing Accounts

What's Best for You?

- By default, there is one super admin. If you really want to delegate, have another most trusted person as another super admin (this is not a must). You need this account to modify organization settings, add users, suspend/cancel the account and modify the color scheme in your webinar room.
- Add a dedicated billing contact – it requires no room permissions (no access).
- How many organizers (moderators) do you need? At least one organizer is required to start a session, continue, and end the session for all. A buddy system is always useful.
- How many presenters? You can either share the guest presenter among any number of presenters. If you have dedicated presenters, add some accounts (see below). Remember that presenters cannot do many things that a moderator can (starting the session, user moderation, chat moderation, launching certain tools (i.e., recast recording).
- Who needs extended admin rights? If a host/presenter needs access to room settings, reports, recasts and events, you can provide it selectively.

Adding a New User

1. Click the *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
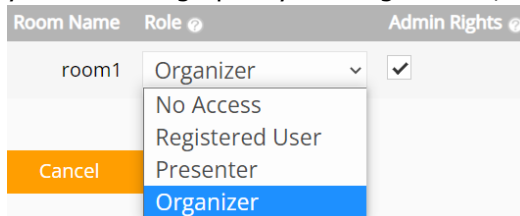
   Super Admin : ⊘ ☐

   Billing Contact : ⊘ ☐

   Guest Presenter : ⊘ ☐

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)

   Tharinda Lasitha
   Biography
   Add CoAttendee

7. Scroll down and select the room(s) to access if there are multiple rooms, and set the *role* (if you are setting up only a billing contact, this step is not required),

Room Name	Role ⊘	Admin Rights ⊘
room1	Organizer ∨	✔
	No Access	
	Registered User	
Cancel	Presenter	
	Organizer	

8. Add extended admin rights for an organizer/presenter,
9. Click *Create*,
10. The new user will get an email with credentials and login details (links, etc.)

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In this section, we will discuss how you can provide access to a webinar room and the different types of methods or techniques you can use.

Access Links and Method

Webinato provides 4 types of access methods. Those are,

1. Direct access using Weibnato access links
2. Event access – Generated by Webinato upon creating events (registration is required for attendees, moderators/presenters must use direct access)
3. Single Sign-On – If you own a website with a user database, it can be linked to Webinato for free. The members can log into your member portal, and click on a link (without having to remember additional login info) to get access. This requires a web developer. Please refer to the following guides below
   Webinato APIs: *https://www.webinato.com/services/apis/*
   Single Sign-on: *http://www.webinato.com/services/apis/sso-api-documentation/*
   Example site: *https://www.webinato.com/api/ssoExample/*

What's Best for You?

To get started, the best way is to use direct access. If you are planning to use Events instead, read the Webinato Event Guide at *https://www.webinato.com/sc/WebinatoEventGuide.pdf*

What Type of Attendee is Best?

- As a start, it's easier to provide guest attendee access with a single/shared password. You can do without a password or even without an email but we recommend keeping the defaults. At the end of the session change the guest's password to prevent guest access in the next session. Since this is a shared account among attendees, anyone can join without your permission. You can obviously kick/ban them with one click (email/IP) but it's a hassle (*how to kick or ban*). Guest passwords can be set up on the room settings page (here).
- Registered attendees are best if you like to use the Manage Users section and manually add registered users. This assures you know the attendees and got greater control than having guest users – you can kick/ban with a single click.
- Use the SSO method (safest) if you got time to implement API integration.
- Event registrants – you can set one-time or recurring events. This gives far more control as only registrants can access events (the link only allows one person), use whitelists for registration or whitelists to allow access (if registration is disabled), and even payment options (PayPal). If this is best, read the guides here.
  - *Quick-start guide*
  - *Event Manager guide*

Where Do I Find Direct Access Information?

Log into the admin page and Go to the *View Access Information (Login)* link.

Let's look at some quick settings you may find useful so you can make the best out of your first webinar.

Basic Room Settings

Click on Modify Room Settings. From there, click on room1 (default name). This will allow you to change the room name to something more fitting, and edit the URL to match.

- If you invite guests, this is where you edit/update the guest password
- Change Room Functions as you see if or keep the defaults. Enable the *documents* folder if necessary. Increase the close room timer to prevent the room from shutting down if the moderator disconnects for a long time. Phone audio can also be enabled from here. For more information refer to the administrator's guide
- Further down there are checkboxes for adding a Top Banner, which gives you additional places to upload images to brand your room
- Configure the time zone to fit your requirements
- There is also a checkbox for the End Marketing URL. This is what the browser will load when attendees exit the room after the webinar is over. This is a good spot for links to surveys, sign-up forms, your company website, etc.

Voice and audio configuration options

There are essentially two ways that you can setup audio:

1. VoIP (Computer Mode) – Use a microphone to speak, and headphones/speakers to listen by selecting the Computer Audio option.
2. Integrated Phone Audio (Phone Mode) – You can use your phone line to present or listen to a webinar by selecting the Phone Audio Option. Refer to the following guides to set it up
   a. Using the phone bridge:
      https://help.webinato.com/support/solutions/articles/5000659177
   b. Enabling phone audio:
      https://help.webinato.com/support/solutions/articles/12000017576
   c. In-room settings: *https://help.webinato.com/support/solutions/articles/12000028446*

Which is best for me?
While we provide you the flexibility to provide computer or phone audio for your presenters and attendees, we highly suggest you consider moving over to VoIP audio using USB microphones and headsets. Upon accessing the webinar room, everyone will be able to select options if both are present.
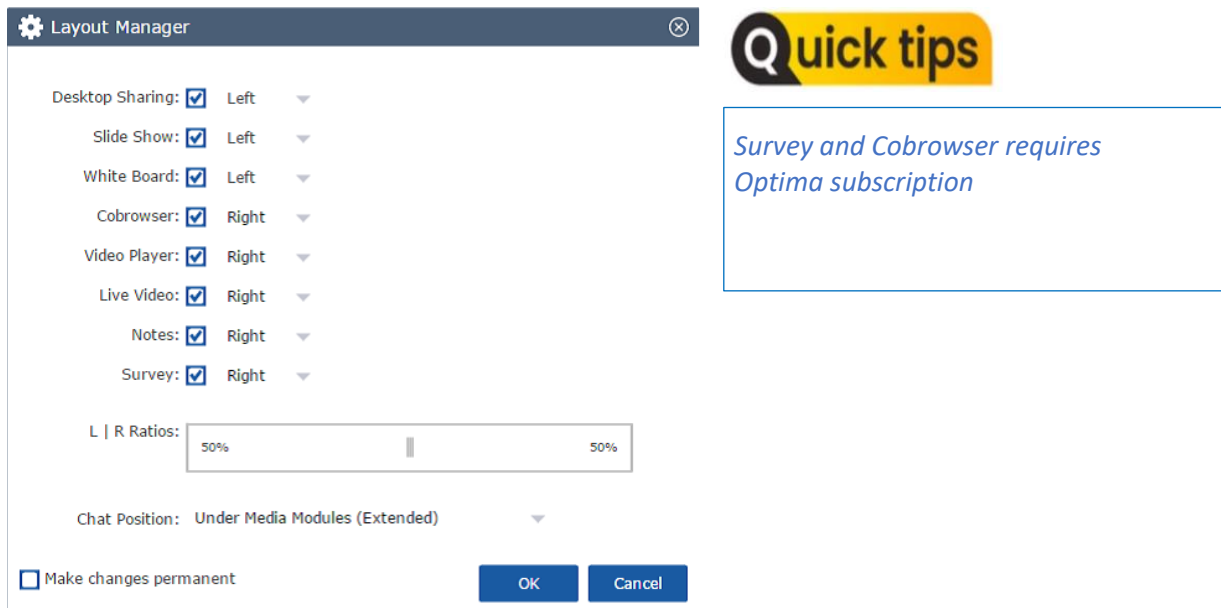
Now let's look at how you are going to moderate the Webinar room. The first step is to get used to the modules and tools. Preloading the content is the second. The third is to deliver a successful webinar.

Default Room Content Modules

Enter your webinar room by clicking the Access My Rooms Quick Link at the top of your Admin Page, and then clicking the name of your room, followed by the Enter Webinar button. Think of this as a virtual conference room.

You can change the layout of each content module by clicking the gear icon in the upper right-hand corner, and then clicking Open Layout Manager. (This can also be done from inside your Admin Page/ Modify Room Settings).

Layout manager options

Refer to *https://help.webinato.com/support/solutions/articles/12000005487* for more details

How to Change the Color Scheme with Smart Skin

Only a super admin can change the settings on the fly. Join the webinar room, click the settings and options cogwheel at the upper-right and go to *Smart Skin*.
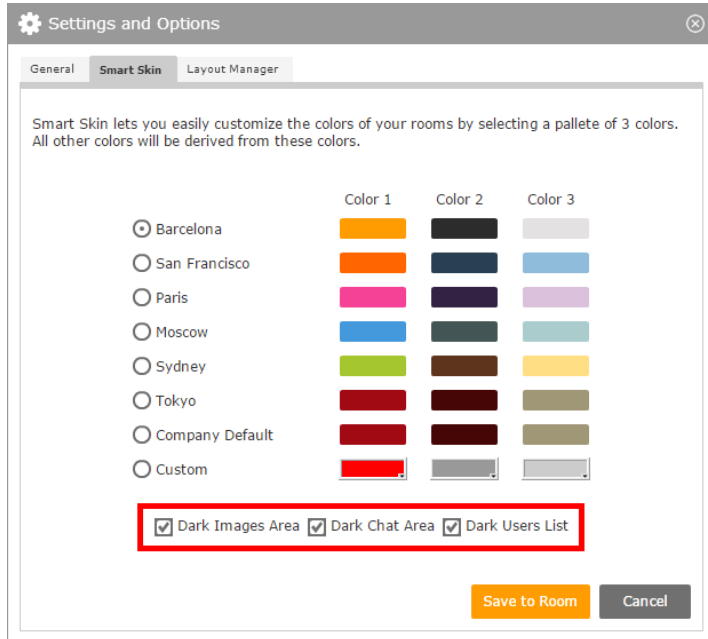
*You can select custom colors for each color scheme from 1 to 3. The **Color1** also applies to the Webinato **Login Page** and its **buttons**.*

Now, let's upload content so you have everything at your fingertips during your event.

Uploading PowerPoint slides

The Slides module enables you to upload your presentation while maintaining the **slide transitions**, as well as **animations**, and because it doesn't require any desktop or application sharing, it is quick and efficient. Just click on the Slides tab, then click the Start Slides button. In the following pop-up window, click the Upload button and navigate to your PowerPoint file. It will then show up in the list of available slide shows. Press lay and it will load the slide show and give you a simple-to-use navigation toolbar.

Refer to the following links for more details (*Using slides*, *troubleshooting*, *best practices*, *compatible fonts*)
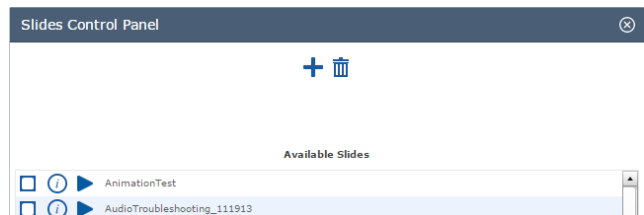
Preloading the Documents folder

You don't need to worry about emailing or screen-sharing files to your audience during the event. Simply upload files (word docs, PDFs, links, etc.) and they will be available to your attendees during your events. Look in the bottom right-hand corner of your webinar room, click on the *Documents* button, and upload.

Refer to *https://help.webinato.com/support/solutions/articles/5000601893* for more…
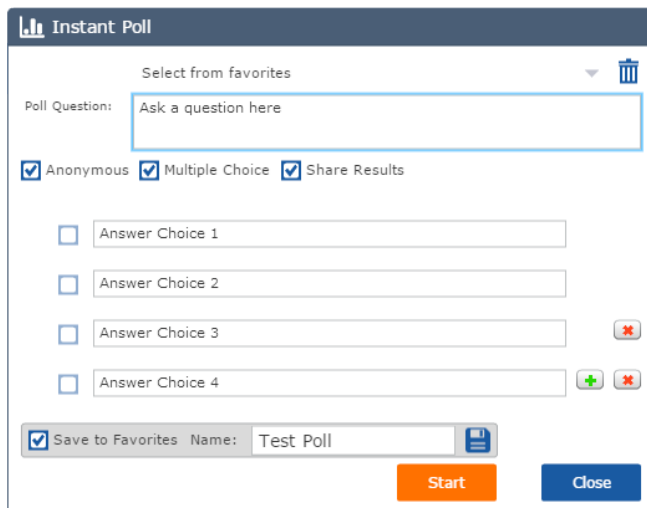
Creating Surveys (Optional)

Get question data and valuable feedback from your attendees. You can have a survey auto-load at the end of your event, or you can load it up at any point during the live session. Just click on the *Survey* tab, and then click start survey. Click add a survey, and use the drop-down menu to select different question types. You can click the checkbox to make the survey available to any other rooms as well.

Refer to *https://help.webinato.com/support/solutions/articles/5000685350* for more…

Creating Instant Polls

Encourage audience participation and get immediate feedback with the *Instant Poll* tool. Click on the Tools button in the bottom right, and then Instant Poll. You can type a question for the audience, and then add various options for them to choo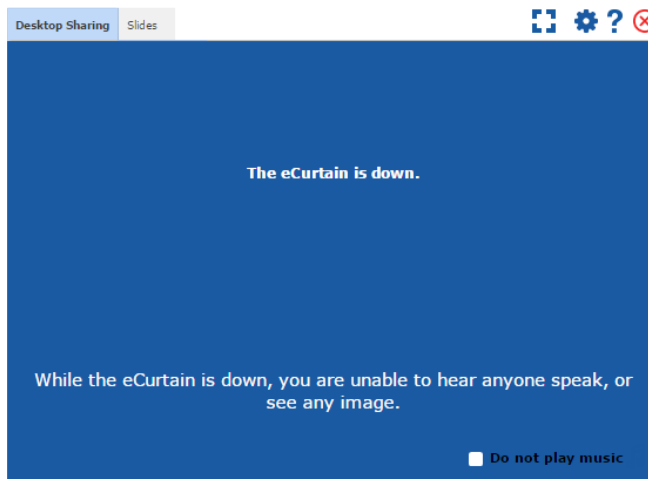se from. You can have the answers be anonymous, or shared with the rest of the audience. If you click the checkbox for save to favorites, it will be available for you to use in future webinars. Click *here* for more details on how to use polls.

eCurtain

You don't want anyone to see your cluttered desktop, or enter the room early and hear your mic check. The *eCurtain* gives you privacy before the event, so you can focus on preparing. In the *Tools* menu, you can click on *eCurtain*. This will hide the media modules and mute the audio to the attendees, so you can prepare and test audio/video with presenters. Simply click the flashing *eCurtain is down* button when you are ready to start.
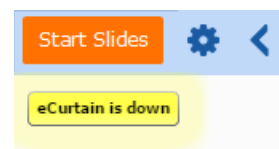
Refer to *https://help.webinato.com/support/solutions/articles/5000601970* for more…

Recording

You have the option to record the event. To start recording, click on *Tools*, and then *AutoPilot Recorder*. From there, give the recording a name, and click start. Once the event is over (or you wish to stop recording), simply click the stop button at the bottom. Refer to *https://help.webinato.com/support/solutions/articles/5000685301* for more...

Q&A Manager

When it's time to open the floor for Q&A, don't let questions get lost or forgotten because they've scrolled by too fast in the chat box. When you click on *Q&A Manager* from the *Tools* menu and then click start, it will change the chat mode for attendees. It will give them the option to ask single questions, and all questions will be presented to you (moderators/presenters) in the *Q&A manager*. You can then assign questions to other moderators/presenters if you desire. Refer to *https://help.webinato.com/support/solutions/articles/5000685306* for more...

Moderating Chat

Take control of the chat with moderation options. If you click on the gear icon in the chat box, you can set several chat options, such as disabling all attendee chat or just privatizing it (only moderators/presenters will see attendee chat). Clicking on an individual attendee's name will give you the option to kick or ban from the room, as well as a mute or private message. Refer to *https://help.webinato.com/support/solutions/articles/5000685292* for more...

Ending the Room

Don't forget to close down the session once your event is over. This will kick any stragglers out of your webinar and redirect them to your end marketing URL. Click the red "X" in the upper right corner and then click the *Click to end the session for all participants* button.

Note that the room report for your event **will not be generated until the session is ended for all participants**. When the event has concluded, you can go back and manage your recording(s) and take a look at data collected during the event, such as chat logs, survey answers, etc.

Managing Recordings

We call our recordings "AutoPilots," as they are more than a flat recording, and can be interactive. Once you have recorded an event, there is no need to do the presentation twice!

You can create an encore event, in a similar fashion as we have done previously. When the event starts, simply go to Tools, and then *AutoPilot Recorder*, and click play on the previously recorded event. You can even **Automate** this process! *More on playback modes*…

The presentation, along with any polls or surveys will happen as if the event were live. If you stay and offer chat support, your audience will get the same high-quality experience as if it were the first time the webinar was being broadcast.

More details are available on *https://help.webinato.com/support/solutions/articles/12000003399*

Collecting Report Data

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 can download chat transcripts, poll and survey data, participant lists, etc. in CSV format. More on *where to find them* and *how to export*…

Room Reports

☒ **Export to Excel** (CSV file)   ☒ **Export to Excel with Polls and Surveys**
Included (CSV file)

Room Name:
Event Name:
Great Leaders
Session Date and Time: June 16, 2015 10:39:03
Total Number of Participants: 153
Maximum Number of Concurrent Participants: 145
Room Opened By:
Duration: 231 mins
Ending comments:

Summary:

No	Choice	Vote Count	Percentage
1	Yes	3	75%
2	No	1	25%

Participants: ?

Participant Time Line