

Setting Up & Using the Magnifi Video Widget (Full Version)

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First Steps

1. Go to <https://widget.magnifi.io/>

The image shows the login page for Magnifi KnowledgeSuite. At the top, there is a logo with a green 'm' and the text 'magnifi KnowledgeSuite'. Below the logo, there is a white box containing the login form. The form has two input fields: 'Email' and 'Password'. Below these fields is a checkbox labeled 'REMEMBER ME'. A green 'Log in' button is positioned below the checkbox. At the bottom of the white box, there are two links: 'Sign up' and 'Forgot your password?'.

magnifi KnowledgeSuite

Email

Password

☐ REMEMBER ME

Log in

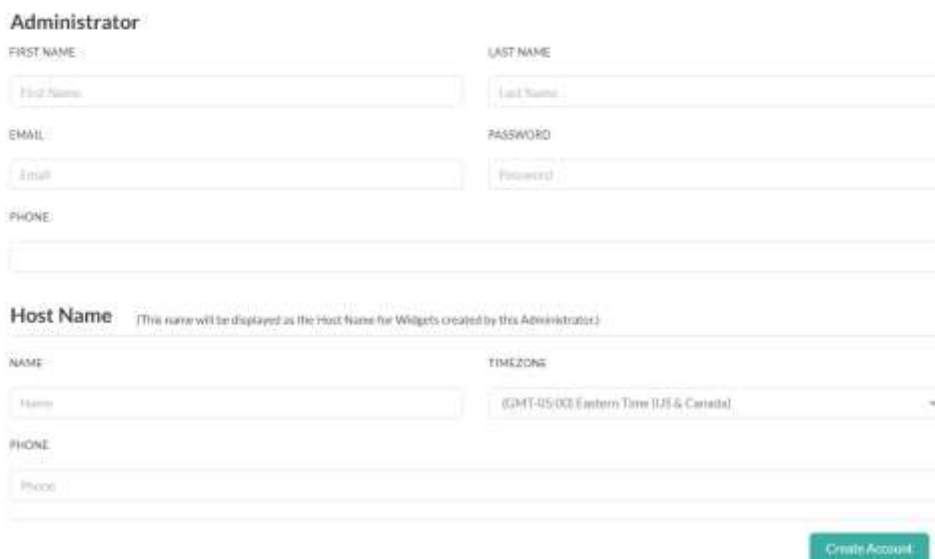
Sign up

Forgot your password?

2. If you are already registered as a Widget user, Sign In with your email address and password now. If you are not yet a Widget user, click **Sign Up** to Register.

Note: Your login for Magnifi videoconferencing is not the same as your Widget login.

3. **Create Account:** Under “**Administrator**” enter your First Name, Last Name, Email Address, then create a password for yourself. Under “**Host Name**”, enter the name you’d like to be displayed as the Host for any Meetings created using this account (this could be your name, the name of the organization you run, etc). Choose your Time Zone, and click on “Create Account”.

The image shows the 'Create Account' form. It is divided into two main sections: 'Administrator' and 'Host Name'. The 'Administrator' section has four input fields: 'FIRST NAME' (with a sub-label 'First Name'), 'LAST NAME' (with a sub-label 'Last Name'), 'EMAIL' (with a sub-label 'Email'), and 'PASSWORD' (with a sub-label 'Password'). Below these is a 'PHONE' input field. The 'Host Name' section has a sub-label '(This name will be displayed as the Host Name for Widgets created by this Administrator)'. It includes a 'NAME' input field (with a sub-label 'Name'), a 'TIMEZONE' dropdown menu (currently showing 'GMT-05:00 Eastern Time (US & Canada)'), and a 'PHONE' input field (with a sub-label 'Phone'). A green 'Create Account' button is located at the bottom right of the form.

Administrator

FIRST NAME: First Name

LAST NAME: Last Name

EMAIL: Email

PASSWORD: Password

PHONE:

Host Name (This name will be displayed as the Host Name for Widgets created by this Administrator)

NAME: Name

TIMEZONE: GMT-05:00 Eastern Time (US & Canada)

PHONE: Phone

Create Account

4. This will take you to your **Settings/Profile**. Review the information on your profile to confirm it's correct and click **Save**.

The screenshot shows the Magnifi web interface. At the top left is the 'magnifi' logo. At the top right is a user profile icon with the text 'Welcome, Jennifer' and a notification bell icon with a red '3'. On the left is a sidebar menu with icons and labels: 'Widget Management', 'Groups', 'Calendar Integrations', 'Meetings', 'Settings', 'Profile', 'User Management', 'Account', 'Subscription', and 'Payment Method'. The 'Settings' option is highlighted. The main content area is titled 'ADMINISTRATOR PROFILE'. It contains several form fields: 'FIRST NAME' (Jennifer), 'LAST NAME' (Radford), 'EMAIL' (jennifer@magnifi.io), 'NEW PASSWORD', 'PROFILE PHOTO' (with a 'Change' button), and 'PHONE'. Below these fields is a horizontal line. Under the line, there is a section for 'HOST NAME' with a note: '(This name will be displayed as the Host Name for Widgets created by this Administrator.)'. This section includes a 'NAME' field (Jennifer Provider), a 'TIMEZONE' dropdown menu (set to '(GMT-05:00) Eastern Time (US & Canada)'), and a 'PHONE' field.

Types of Widget

5. Types of Widget

The Magnifi Widget offers the user a choice of two functionalities

- **“Call”** which allows you to receive “incoming calls” from your clients; and
- **“Meeting”** which is a group meeting for which the link can be shared.

Call Functionality:

If you would like your clients to be able to call you directly from your website, activate Call functionality within the Widget. Note that at this time, there can be only one Host (you) for this call. Additional participants can be invited to the call using the meeting link from within the Widget once the meeting has begun.

Meeting Functionality:

Use cases of the Meeting Widget include situations such as

- As the digital venue for an online webinar;
- Including it in a channel to invite your team to a daily stand-up;
- Including it in your project management software to launch a meeting.
- Including it in your customer care centre software to allow customer care reps to easily schedule meetings with clients

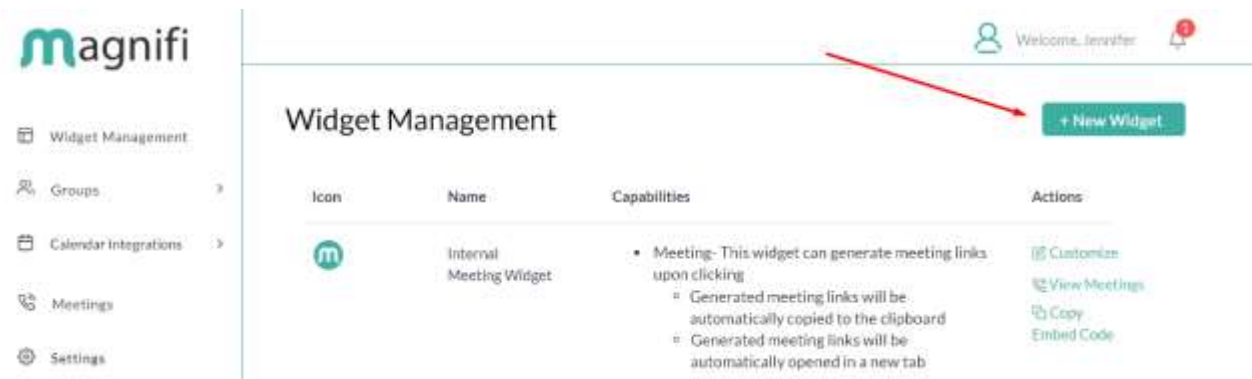
The Meeting Widget can be joined by as many as 50 people simply by clicking on the Widget button to generate a link which they then use to join the meeting.

Creating a Widget

6. How to create a Widget:

In the left navigation panel, there are several options: Widget Management, Groups, Calendar Integrations, Meetings, and Settings.

To create a Widget, Click on “**Widget Management**” in the left navigational column, then select “**+New Widget**” from the top right.



7. The **New Widget** Screen will appear.

- Fill out the **Name** of the Widget, and the default-selected “Group” **Room Type**.

New Widget ×

WIDGET NAME	ROOM TYPE
<input type="text"/>	Group ▼

- Widget Capabilities options are divided into **two sections**, those for the **Call** capability, and those for the **Meeting** capability.

WIDGET FUNCTIONALITY (Please choose EITHER Call OR Meeting functionality, depending on use case)

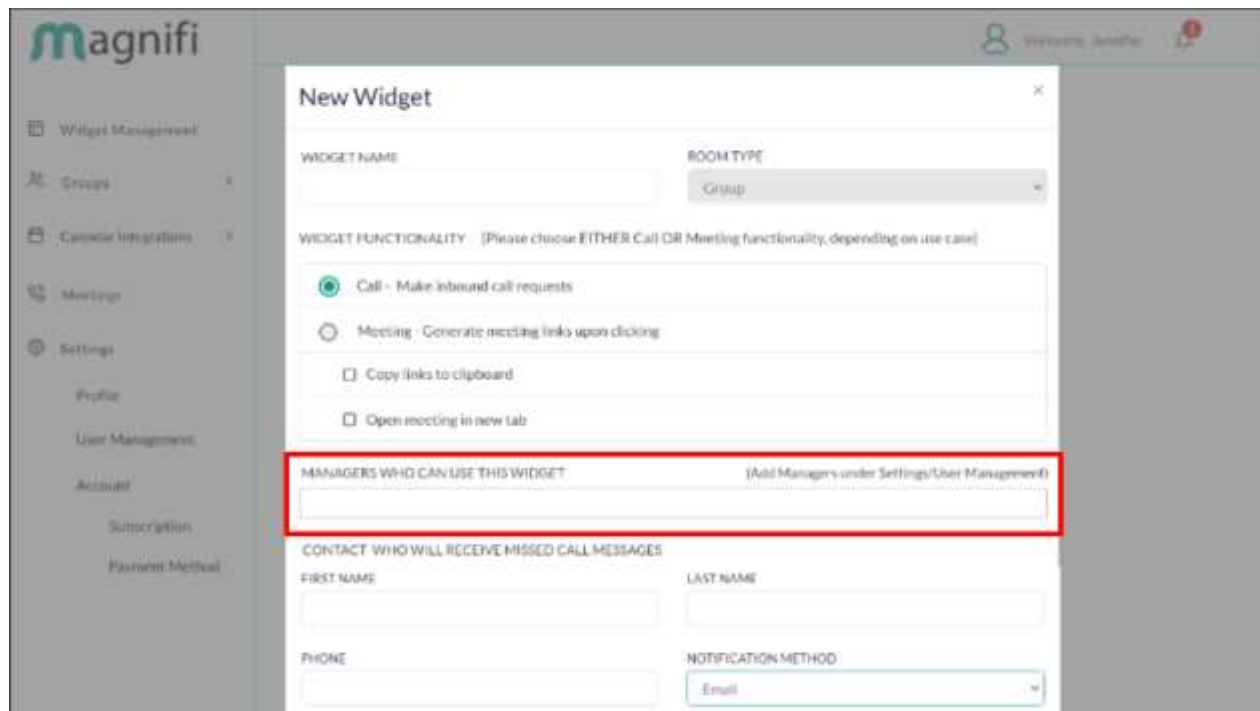
<input type="radio"/>	Call - Make inbound call requests
<input checked="" type="radio"/>	Meeting - Generate meeting links upon clicking
<input type="checkbox"/>	Copy links to clipboard
<input type="checkbox"/>	Open meeting in new tab

To activate the Call functionality

- Select “Call – Make inbound call requests.”
- Two further Options will appear associated with the Call Widget

Managers Who Can Use this Widget (Call Functionality)

This option is intended to ensure someone in your organization is available to answer incoming video calls. If you leave this field blank, the only person who will be able to answer calls is you, as Widget Administrator.



Before you can add people to inbound call roster, you must create sub-accounts for them under **Settings/User Management**. After you have done so, Managers you would like to authorize to answer incoming calls can be selected here. Click on the field and begin typing a Manager's name, and select the correct name(s) to add to the list for this Widget

Contact Who Will Receive Missed Call Messages

What happens if no-one answers a video call? After the call rings several times, if no-one answers, the system displays a message page where the caller can leave a contact request. By default, all messages go to the Widget Administrator, but you can designate someone else on your team to handle these messages. You can choose anyone you like to take on this role. You enter their contact details, select which notification method by which they should receive the messages, and include their email address or mobile telephone number so the system can forward the messages to them.

New Widget

WIDGET NAME:

ROOM TYPE:

WIDGET FUNCTIONALITY (Please choose EITHER Call OR Meeting functionality, depending on use case)

☒ Call - Make inbound call requests

☐ Meeting - Generate meeting links upon clicking

☐ Copy links to clipboard

☐ Open meeting in new tab

MANAGERS WHO CAN USE THIS WIDGET (Add Managers under Settings/User Management)

CONTACT WHO WILL RECEIVE MISSED CALL MESSAGES

FIRST NAME:

LAST NAME:

PHONE:

NOTIFICATION METHOD:

To activate the Meeting functionality

Alternatively, you can set up the Widget so that Authorized Managers or Users can generate a meeting link and share invitations to the meeting to members of the organization or any other invitees they choose (who you wish to invite will depend on the context within which you embed an instance of the Widget)

- Place a checkmark in the first box marked “Meeting – Generate meeting links upon clicking”;
 - Select if you’d like the generated Meeting link be **copied to the clipboard** (to send to invitees).
 - Select if you’d like the Meeting link to be **opened for you in a new tab** in your browser (so that you can join the meeting immediately)

Managers Who Can Use this Widget (Meeting Functionality)

This is where you Authorize Managers to manage this Widget. Management tasks include being able to embed a new instance of the Widget, edit the Widget, and access recording made by that Widget. To give someone Manager-level permissions, you must create sub-accounts for them under **Settings/User Management**. After you have done so, Managers allowed to manage this Widget must be added here — Click on the field and begin typing a Manager’s name, and select the correct name(s) to add to the list for this Widget. By adding a Manager in this field, you give them permission to both use and manage the Widget.

To authorize *users* of this Widget who are not also empowered to manage the widget, please see the section on **Groups**, later in this guide.

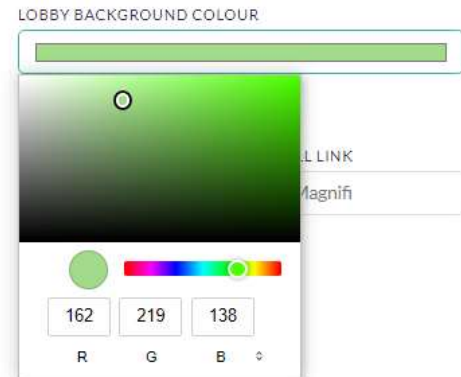
Widget Settings:

This section is the same for both Call and Meeting Widgets

Icon: The default widget icon is the teal Magnifi “M”. If you would prefer to use another image as the widget icon (such as your brand logo), click the “Change” button to upload a new image file (PNG, JPG)

Lobby Background Colour: The default lobby background colour is light grey, but you can customize it to any colour you wish by clicking on the colour sample and either

- Entering the RGB codes for your specific colour; or
- Using the colour slider to select an initial hue and using your mouse pointer to refine tint, shade, tone and saturation.



Record: If you’d like to save recordings of Calls or Meetings that are created by this Widget, place a checkmark next to Record.

Transcribe: If you like to have the system transcribe Calls or Meetings that are created by this Widget, place a checkmark next to Transcribe.

Provide Dial In Number For Meetings: In case there are users who do not have access to a webcam at the time of a call or meeting, the system can generate a secure dial-in number for those invitees to join the meeting.

Share Meeting Links

This is where you can customize the emails the system automatically send to people you to invite to a meeting.

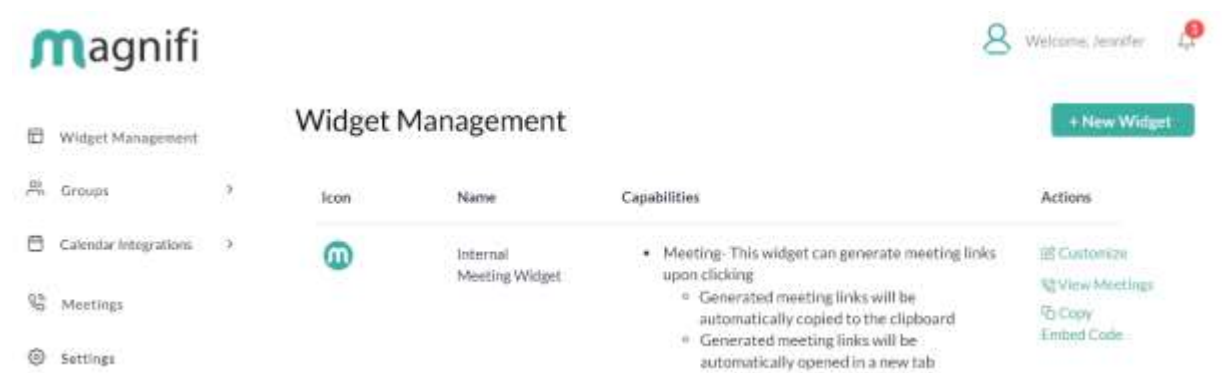
Message When Sharing: This is the copy that will be sent out to invitees if you share the meeting link by email when in a meeting room. You can leave the copy as is or make edits to it. Note that the placeholder `{{MeetingLink}}` is where the Widget Link will appear.

Share Meeting Links

MESSAGE WHEN SHARING	EMAIL SUBJECT WHEN SHARING
<p>Available Placeholders: <code>{{MeetingLink}}</code>, <code>{{HostName}}</code>, <code>{{DialInNumber}}</code></p> <div><p>Hello,</p><p>Robert Provider has invited you to a meeting. You may join by visiting the following link:</p><p><code>{{MeetingLink}}</code>.</p><p>Thanks.</p></div>	<div><p>I'd like you to join my meeting on Magnifi</p></div>

Take a moment to review your selections then click **Save** when ready.

8. You have created your first Widget!



9. If you need to go back and edit any of the custom options from the last step, click on the “Customize” option to do so.

User Management

10. User Management is where you set user permissions. There are 3 levels of User Permissions.

- **Administrator:**
 - owns the Widgets in the account;
 - can create new widgets;
 - can generate meetings using all Widgets in the account;
 - sets permission for other users in the account;
 - has a user login and password for the Widget Admin.
- **Manager:**
 - can create Widgets within the account and assign authorized users to those Widgets;
 - generate meetings on a Widget when they are assigned to the Group for that Widget;
 - can answer inbound calls when listed as under “Managers Who Can Use This Widget” for a Call Widget;
 - can edit the Widget, access recording made by this widget, and embed new instances of the Widget when listed as under “Managers Who Can Use This Widget” for a Meeting Widget
 - has a user login and password for the Widget Admin.
- **User:**
 - Can ONLY generate meetings on a Widget when they are assigned to the Group for that Widget;
 - Does NOT have login privileges for the Widget Admin.

When you first login as Administrator the User Management list will be blank.

11. To add a New User, begin by clicking on the “+New User” button in the top right of the screen. This will open the New User screen.
- Set the User’s permission level first (Manager vs. User);
 - Remember to select “Email Credentials to this User” if you have selected Manager Permissions;
 - Enter the User’s Name and Email address;
 - The Password field only becomes editable when the Administrator sets Manager permissions for the new User. If you have selected Manager permissions, set a password for your new Manager.
 - Click Save and the New User will be added to your User Management List
 - Note that you MUST add Managers on this screen. Lower-level Users can be added here or Ad Hoc under “Group Members”.

The screenshot shows a 'New User' form with a title bar containing a close button (X). The form has two radio buttons for 'PERMISSION LEVEL': 'User' (selected) and 'Manager'. A checkbox labeled 'EMAIL LOGIN CREDENTIALS TO THIS USER (Managers Only)' is present. Below these are input fields for 'FIRST NAME', 'LAST NAME', and 'EMAIL'. The 'PASSWORD' field is currently disabled (grayed out). At the bottom left, there is a 'PROFILE PHOTO' section with a user icon and a 'Change' button. A 'Save' button is located at the bottom right of the form.

Groups & Authorizations

12. Groups:

Groups are how we authorize sets of Users to access each Widget.

Group Settings control **who can generate meetings using a Meeting Widget**. If you are the only person who will be creating meetings from your Meeting Widget, you can skip this step.

(A Group can include one or more people who are authorized to use a Meeting Widget. Each Group must include at least one person.)

When you first sign in as an Administrator, the Groups list will be empty.

Creating your Group:

13. Click on **Groups > New Group** in the left navigation panel. This will take you to the New Group screen.

- Fill in the **Group Name**, a **Description** of the group (optional), and a **Unique Identifier** (UUID) to identify your Group. The UUID can be long or short, and may include numbers, letters, as well as the symbols available on a standard keyboard.
- Choose the **Meeting Widget** that this Group will access.

The 'New Group' form is a light gray box with a close button (X) in the top right corner. It contains several input fields: 'NAME' (empty), 'DESCRIPTION' (empty), 'GROUP ACCESS TOKEN' (containing '9mN3et5'), and 'GROUP UNIVERSAL UNIQUE IDENTIFIER (UUID)' (empty). At the bottom, there is a dropdown menu labeled 'WHICH WIDGET WILL THIS ORGANIZATION USE?' with 'Jennifer test widget' selected.

Adding Members to your Group:

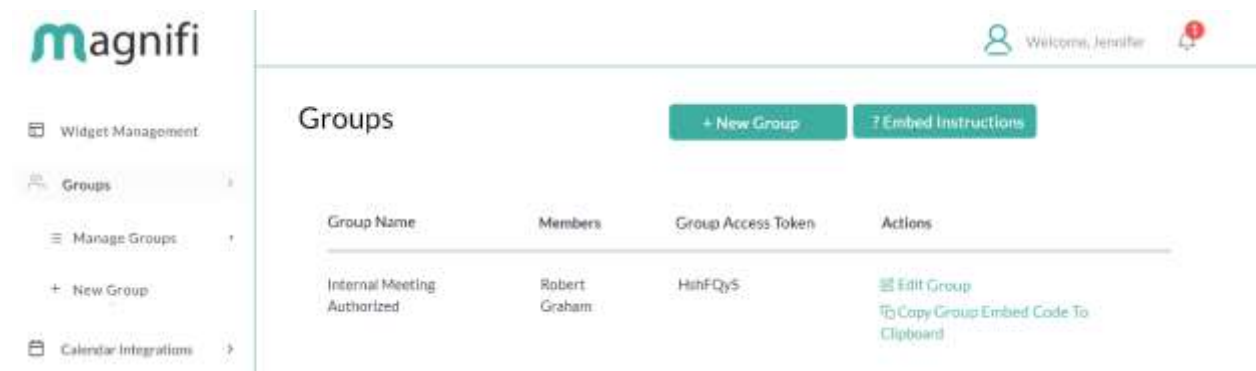
14. These are the Users and Managers within your Group that have permission to use this Meeting Widget.

- Each Group can only be attached to one Widget.
- Click on **+Add Member** and fill in **First Name**, **Last Name**, and **Email**,
- Next you will specify a **Unique Identifier** (UUID) for your Group member. The UUID can be an email address, or a unique code that your site/software has access to – for example, the internal login ID of the specific user on the software the Widget is being included in. The UUID is an open variable so that each company can easily customize it to integrate the Widget into their software. The UUID will need to be passed to the Widget to identify the user of the Widget.
- Click **+Add Member** and fill out the form to add each User or Manager you would like to authorize to use this particular Widget.
- You can add Users here ad hoc as authorized to activate a specific Widget.
- If you add someone in error, or have an empty Member slot, use the **Remove** button to clear that entry.
- Click Save.

The 'Add Members' form is a light gray box with a title 'Add Members' and a subtitle 'To enable a User or Manager to generate meetings with this Widget, add them to the list below'. There is a green button with a white plus sign and the text '+ Add Member'. Below the subtitle, there are four input fields: 'FIRST NAME' (containing 'Robert'), 'LAST NAME' (containing 'Graham'), 'ACCESS TOKEN' (containing 'FQVHDnw'), and 'UUID' (containing 'robert@magnifi.io').

NOTE: if you add a Manager to a Group for a Widget, you are authorizing them only as a Widget *user*. To provide the Manager with management permissions for that Widget, you must ALSO add them as a “Manager Who Can Use This Widget” in the Widget form itself. Managers can be added after a Widget has been built by selecting the “Customize” option for that Widget on the Widget management page.

You have now set the Authorizations for who can use your Meeting Widget!



If you need to add or remove people from the authorizations, click on “Edit Group” to do so.

Copying the Embed Code

Deciding which Embed Code to use

15. Deciding which Embed Code is the correct one to use for your situation

Generally: If you are embedding a Call Widget, then **you can copy the specific Embed Code from the Widgets tab** in the left navigation panel. (See Step 17, *Embedding a Call Widget or a single-host Meeting Widget*)

If you (the Administrator) are **the only person** who will be generating meetings using your Meeting Widget, then **you can copy the specific Embed Code from the Widgets tab** in the left navigation panel. (See Step 17, *Embedding a Call Widget or a single-host Meeting Widget*)

If you have created **a set of users** within your Group who are authorized to generate meetings using your Meeting Widget, then **you MUST copy the specific Embed Code from the Groups > Manage Groups tab** in the left navigation panel. (See Step 18, *Embedding a multi-host (Group) Meeting Widget*)

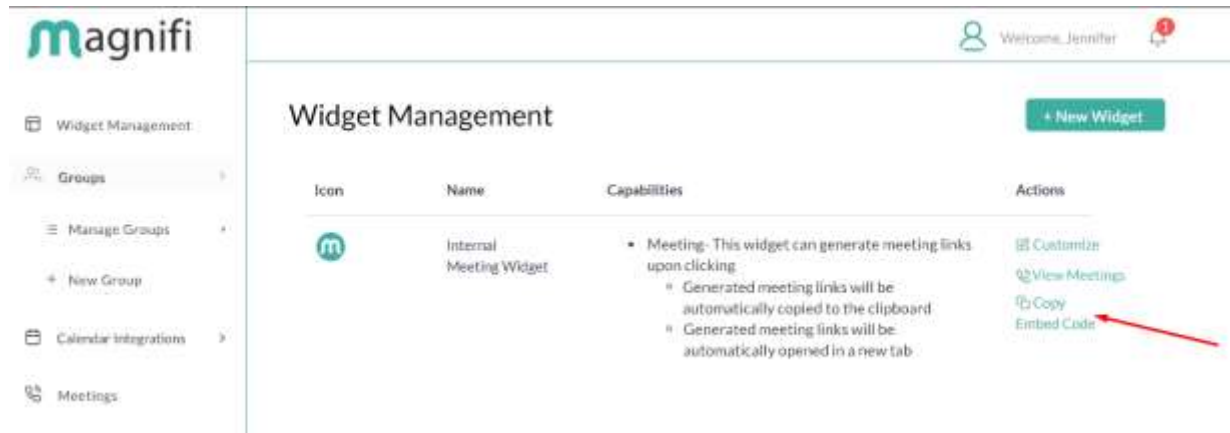
Examples

- **Embedding a Call Widget on a website** intended to direct client calls to either a single person (you), or a roster of yourself and others authorized to answer - copy the specific Embed Code from the **Widgets tab**
- **Embedding a Meeting Widget for your solo use** to smooth your personal workflow - copy the specific Embed Code from the **Widgets tab**.
- **Embedding the Meeting Widget in a software package** which users will be **logged into** while using – copy the specific Embed Code from **Groups > Manage Groups**. Make sure the UUID for each authorized user corresponds to the UUID already used to identify that user by the software package (see step 14, *Adding members to your Group*).

How to Copy the Embed Code

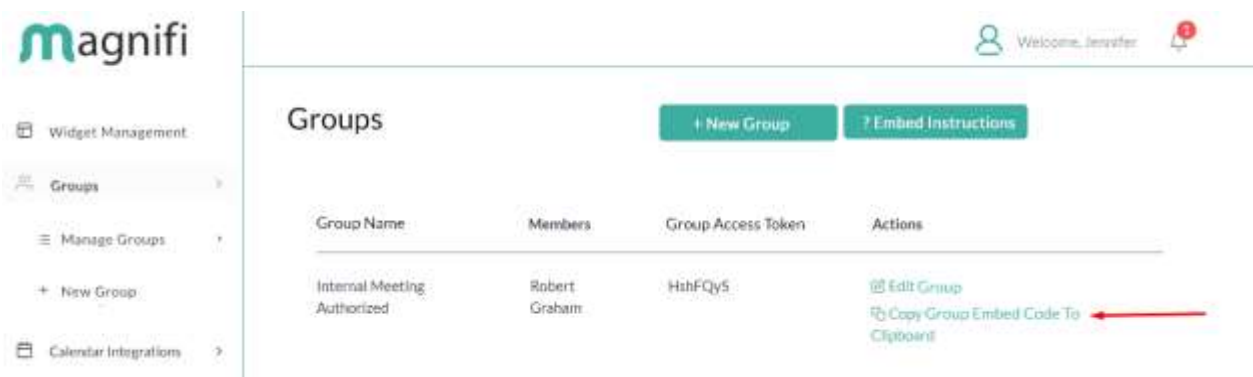
16. How to Copy the Embed Code:

- **From the Widget Tab:** Click on Widgets in the left navigation panel, and select the specific Widget you'd like to use. Click on "Copy Embed Code" for that widget.



When you click on the Copy link, a **green message** will appear at the top right, indicating the code has been successfully copied.

- **From the Groups tab:** Click on Groups, then select "Manage Groups". As part of setting up each Group entry, you will have associated it with a specific Widget. Choose the specific Group you'd like to use. Click on "Copy Group Embed Code To Clipboard" for that Group.

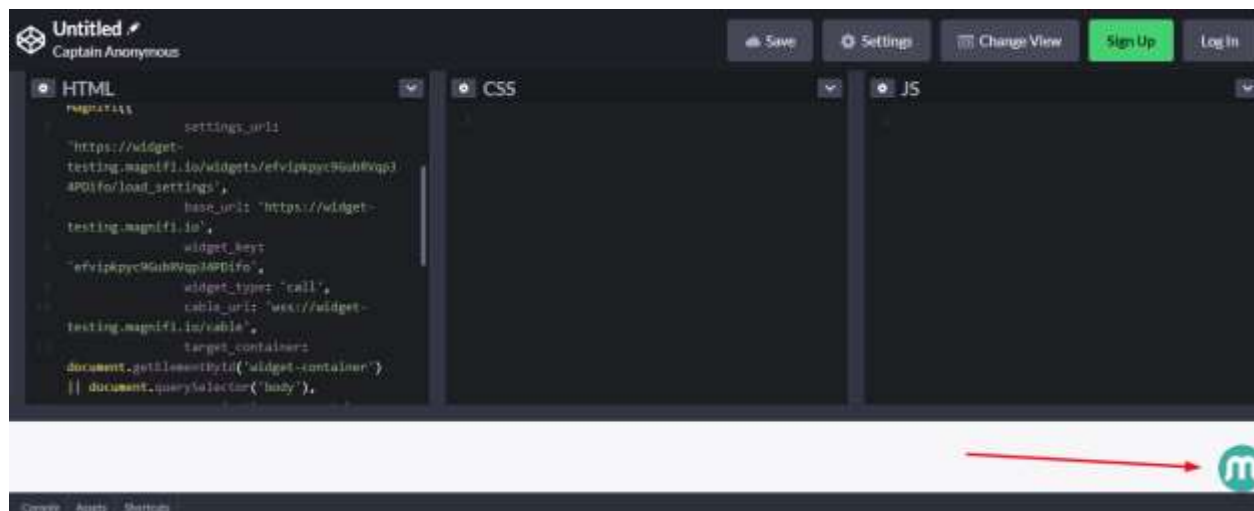


Embedding the Widget in your Website or Application

Next we include the embed code in your website or application. We're going to use <https://codepen.io/pen> to show our example.

Embedding a Call Widget or a single-host Meeting Widget

17. After you have copied the Embed Code from the Widgets tab, paste the code into the HTML of your website or application, and the widget will appear in the lower right corner of the screen. Note that apart from the Icon, the widget is created without styling. The styling can be adjusted using CSS.



Embedding a multi-host (Group) Meeting Widget

18. After you have copied the Embed Code from the Groups > Manage Groups tab, paste the code into the HTML of your website or application.
 - Before you can activate the Widget for use, you must specify the user who will be accessing the Widget. After pasting the code, make sure you set the following variable:
MagnifiSdk.organization_member = {unique_identifier: 'member123', first_name: 'Member', last_name: 'One', email: 'memberone@yopmail.com'}
 - Customize the code above by using the details from the specific user's details and UUID (unique_identifier) as set in the Members for the Group associated with this Widget.
 - Drop the code at the end of the Widget, just PRIOR to the closing </script> tag



- Note that in an Application (rather than on a webpage) this step will be addressed by your developer, who will add extra JavaScript to set that variable in the DOM.

- As a default, the Widget will appear in the lower right corner of the screen. Note that apart from the Icon, the widget is created without styling. The styling can be adjusted using CSS.

Setting a Call or Meeting Widget to open in a popup window

19. If you want the calls to open in a popup window, set the following variable equal to true:

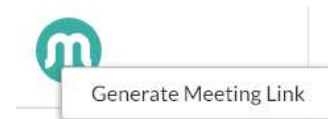
```
Magnifi.open_calls_in_popup_window.
```

- This will involve asking your developer to add some extra JavaScript to set that variable in the DOM.
- This allows you to do things like share your screen while being able to see the call participants at the same time, side by side.

How to engage in a Call using the Magnifi Video Widget

To use a Meeting Widget

1. For a single-host Meeting Widget, the Host (you) must be signed into the Widget Admin site (<https://widget.magnifi.io/>). The Host must join the meeting first, in order for the other parties to be able to join the meeting.
2. For a multi-host Meeting Widget, the Host is already signed in to the Widget admin site by default.
3. The Host clicks on the Widget which brings up the “Generate Meeting Link” command. Host selects “Generate Meeting Link”
4. The Host shares that link to anyone they want to invite as a participant to the meeting, in any manner they choose (chat, email, text, etc.).
5. Each Participant clicks on the link to join the meeting. They will be asked for a Guest user name if they are not signed into a Magnifi account already. Anyone can join a Widget call, whether or not they are a Magnifi user.
6. Up to 50 participants can be invited to a Widget group call.



To use a Call Widget

1. The Host (you) or another Manager authorized to answer must be signed into the Widget admin site (<https://widget.magnifi.io/>) and the Widget Admin tab must be open on that person's device in order for the other parties to be able to join the meeting.
2. A client or member of the public clicks on the Call Widget, which you have already embedded on your website or other application.
3. The Call will ring through to your Widget Admin panel on your computer, just as a telephone would. A visual prompt will appear with the option to answer the call.
4. The Host answers and the video call is connected. At this point more users can be added by sending an email link from within the call. Up to 50 participants can be invited to the call in total.