Virtual Shareholder Meeting

QuickStart User Guide

Admin View

Powered by Broadridge Q4

Admin View

ADMIN CONSOLE

START/END BROADCAST

START BROADCAST will enable content in the live broadcast display to be viewed by the event audience.

END BROADCAST will end audience viewing, but everyone else in the Event Admin Console will remain and can continue collaborating.

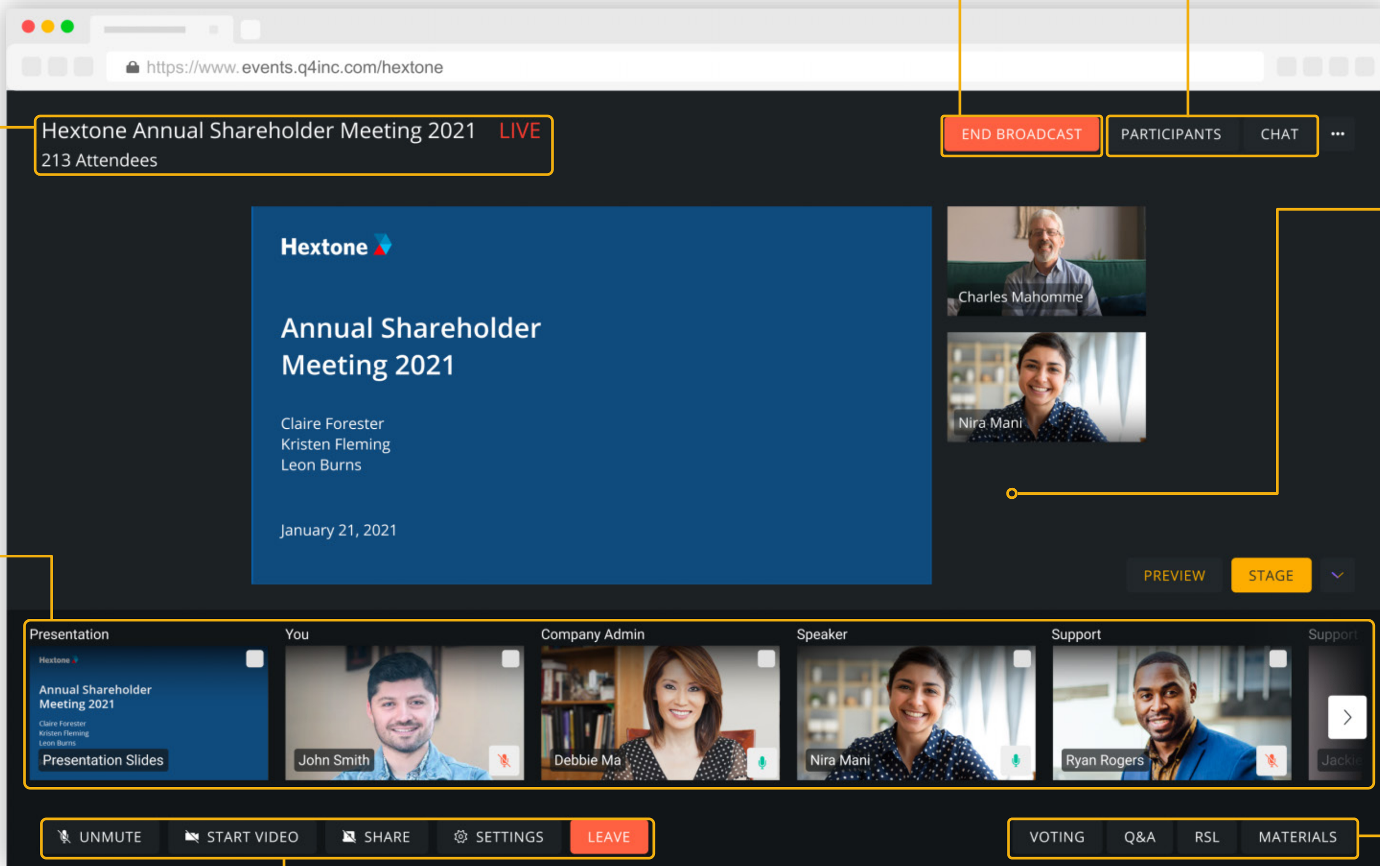
USER MANAGEMENT

CHAT is used for team collaboration during the event, especially when the event is live and speaking is limited between non-speakers.

PARTICIPANTS enable the ability to view and manage all participants who have joined the event,.

EVENT TITLE, STATUS, AND ATTENDEE COUNT

The title and status of the event allows all users on the Event Admin Console to always know the exact name and state of the event. A count of the number of Attendees viewing the event are also displayed.



LIVE BROADCAST DISPLAY

The live broadcast display shows exactly what is being broadcasted to the audience when live. Its format will be dependent on the type of stream(s) that are selected (e.g., Speaker webcam and/or screen share). Two broadcast control options exist:

PREVIEW selected streams before they go live.

STAGE pushes the selected streams directly live to the audience and takes over the live broadcast display.

STREAM CAROUSEL

The stream carousel provides a view of all the media content that could be selected and pushed to the live broadcast display. It also acts as a way for Hosts that are controlling the event to preview and manage Speaker audio, video, shared media content, and digital files (e.g., MP4).

VSM MANAGEMENT

Turn **VOTING** on/off, and monitor votes cast during an event.

Q&A allows Company Administrators to view and prioritise shareholder questions received before or during an event. The questions are sorted into separate **RECEIVED**, **REJECTED**, **QUEUED**, and **ANSWERED** tabs.

MATERIALS display a list of Materials that have been uploaded by the Company prior to an event to share with its Shareholders.

RSL can be turned on/off for Attendees during a live event.

PERSONAL SYSTEM SETTINGS

Includes options to **MUTE/UNMUTE** the microphone, **START/STOP VIDEO**, and **SHARE/UNSHARE** (Entire Screen, Application Window, or a Chrome Tab). Additional **SETTINGS** are available for the microphone and webcam, allowing users to select various inputs. The **LEAVE** button provides an option to leave the call as an individual.

User Roles

User Type	User Role
Q4 Admin User	Event Producer - User who helps with the behind-the-scenes execution of a live event, including starting/ending the broadcast and turning on/off VSM functionality.
	Host - User who helps choreograph the event, including assisting with stream management. May have a speaking role, helping introduce/end VSMs.
Client User	Company Administrator - User who helps with the behind-the-scenes execution of an event, including organising of Q&A Example: Legal counsel or an investor relations team member.
	Speakers - User whose main focus is to speak to Attendees during an event. Example: CEO or CFO

Personal System Settings (Screen Sharing)

To share a screen within the carousel, which can then be sent to the live broadcast display, follow the procedure below:

1. Click the **SHARE** button.
2. A dialog box will appear with three tab options to share your screen, namely, Your Entire Screen, Application Window, or Chrome Tab.
    a. If selecting Your Entire Screen, a preview will be shown.
    b. If selecting Application Window, you will be asked to choose a window.
    c. If selecting Chrome Tab, a list of open tabs will be displayed to select. See "Best Practices for Screen Sharing" for more information.
3. Once complete, click **SHARE**, else click **CANCEL** to close the dialog box.

The shared screen will appear in the carousel for selection and can be sent to the live broadcast display. When clicking **UNSHARE**, the shared screen will be removed from the carousel or live broadcast display, if it has been staged.

Best Practices for Screen Sharing

When screen sharing, it is important to set up an optimal environment to ensure a smooth-running live broadcast. Here is a list of some of the best practices for screen sharing:

- Have a secondary monitor dedicated to hosting the presentation screen, so the Event Admin Console can be kept on the primary monitor.
- The best option for screen sharing is either to select your Application Window or Chrome Tab. The Your Entire Screen option might result in sharing unwanted personal information from a computer, such as notifications or other documents that may be open in the background.
- Keep a hardcopy of the presentation script to free up real estate on the monitors.
- When using Google Slides, click the arrow beside the Present button to select the "Presenter view" option. Select the Chrome Tab to be shared and use the "Presenter view" window to advance the slides while keeping the actual presentation in the background. This process will keep the cursor out of view of the presentation.

- When presenting using PowerPoint, make sure to have the "User Presenter View" option selected. It will open up a separate window to allow you to advance slides without having to click on your full screen presentation. This prevents the possibility of a mouse cursor showing up on the presentation when you screen share. In the Presenter View window you can click the **Unmaximize** button in the top right corner and then resize the window. Once it has been resized, you can keep the Presenter View window open above your Admin Console so you can push slides from the menu dock.
- In order to improve the playback and performance of presentation slides, remove all animations and transitions as they may cause lag and a decreased performance speed. If a presentation file is large, try reducing the size by making images smaller, removing gradient fills and transparent objects (Opt for solid color fills).

Stream Carousel & Live Broadcast Display

A live stream refers to the shared screens, digital files, and Speaker audio and videos that are broadcast to Attendees. Host and/or Company Administrators can manage live streams by coordinating the streams in the carousel, previewing selected streams, and staging those streams to the main live broadcast display.

Manage a Live Stream

The streams that are being broadcast are displayed in the middle of the Event Admin Console in the live broadcast display. You can click the down arrow next to the **STAGE** button to close the carousel and maximize the area of the screen available to view.

During the event, you can monitor streams and switch out the live broadcast display as required.

For example, you might stream the presentation with accompanying Speaker videos while the Host gives an introduction, and then remove the presentation and switch to only Speakers during the **Q&A**. The available streams are displayed in the carousel at the bottom of the screen.

1. In the carousel at the bottom of the screen, click one or more Speaker streams and/or shared screens to broadcast.
2. Click **PREVIEW**.
3. Check the preview to confirm that the correct streams have been selected. If you need to change something, you can click **CANCEL** and make another selection before previewing again.
4. Click **STAGE**.

Once the Speakers are ready, you can now click **START BROADCAST** to begin the meeting, whereupon Attendees will begin viewing the selected content.

Note: Event Producers have permissions to start the live broadcast, whereas Company Admin and Speakers do not.

During the meeting, you can continue to manage the live broadcast display. If you need to change what is being displayed on the screen, you need to, again, select all streams that you want to broadcast from the carousel, and then click **SEND LIVE**.

User Management

As an Q4 Admin and Client Users, you can chat with all participants publicly or privately as well as view all participants attending the live event.

Chat

Messages can easily be sent publicly or privately. After clicking the **CHAT** button, the chat panel will appear from the right.

To send a public message, select Message Everyone from the dropdown, type your message in the available textbox, and click the send icon.

To send a private message, select a Q4 Admin or Client User from the dropdown, type your message in the available textbox, and click the send icon.

New messages are indicated by a notification dot within the same dropdown.

Participants

A participant can be anyone on the Event Admin or Attendee Consoles. After clicking the **PARTICIPANTS** button, the participants panel will appear. The participants are sorted into two tabs, namely, Team and Attendees.

The Team tab lists all Q4 Admin and Client Users with their name and role. Clicking the three dots on the right of a user allows for that user to be renamed. Additionally, you can start a chat with an individual user.

You also have the option to **MUTE ALL** participants or **INVITE** a participant. Clicking the **INVITE** button will bring up a dialog box to select a registered user from a dropdown list as well as if that user will participate as a Speaker or Company Administrator. Click **INVITE** when done, else click **CANCEL**. Alternatively, click **COPY INVITE** to copy an invite link to your clipboard, which you can then distribute.

The Attendees tab contains the name and email of Attendees.

VSM Management

Find out below how to manage the Q&A section by adding questions to the queue, marking a question as answered, and rejecting questions.

Q&A Management

Shareholders can submit questions using the Q&A feature during a virtual shareholder meeting. Company Administrators can manage the Q&A to make sure Speakers see and answer the appropriate questions in the desired order.

Click the **Q&A** button at the bottom right of the screen to open the Q&A panel. The panel contains four tabs:

- **REJECTED:** Displays questions that have been rejected from the **RECEIVED** tab. From here, you can move a question to **QUEUED**, if it has been rejected incorrectly.
- **RECEIVED:** New questions are displayed in this tab when they are received. From here, you can add **(+)** them to the queue or reject **(X)** them.
- **QUEUED:** Displays all the questions that have been queued for answering. From here, you can change the order, or move questions out to the **REJECTED** tab.
- **ANSWERED:** Displays questions that have been marked as answered.

Add a Question to the Queue

As a Company Administrator, you can view all the questions that come into the **RECEIVED** tab. You can add questions that have been received to the queue so that the Speakers can see and answer them during the meeting.

To add a question to the queue, complete the following steps:

1. Click the **Q&A** button to open the Q&A panel, and go to the **RECEIVED** tab.
2. Scroll through the list of questions to locate one's that should be queued.
3. Click the **+** button to the right of the question.

After you complete the steps above, the question moves to the **QUEUED** tab. Now, event Speakers will be able to see questions they need to answer.

Note: Event Speakers will only see questions in the **QUEUED** tab.

Manage Queued Questions

Once you have added questions to the queue, Company Administrators can begin to manage and prioritise queued questions. This helps your Speakers to answer questions in a preferred order.

To manage queued questions, go to the **QUEUED** tab in the Q&A panel. This displays all the questions that have been queued so far. From here, you can take the following actions:

- Rearrange the order of the questions by dragging and dropping them into place. You need to use the drag bar (Three horizontal lines) to the right of the question for this.
- Reject a question by clicking the **X** to the right of the question. This moves the question to the **REJECTED** tab.

Mark a Question as Answered

Questions from the queue can be dragged in the highlighted Current section for the Speaker to answer. Once the question has been answered by the Speaker, clicking **NEXT** will bring up a confirmation window. Click **CONFIRM**, and the question will be moved into the **ANSWERED** tab, else click **CANCEL** to close the window. In addition, upon clicking **CONFIRM**, the next question to answer will be moved to the Current section.

Clicking **Previous** will bring the previous question back into the highlighted Current section.

Reject a Question

Shareholders can submit questions before or during a virtual shareholder meeting.

As a result, it can be common to receive duplicate or unrelated questions. When this happens, as a Company Administrator you can reject the question so that speakers don't see it among the rest of the queued questions.

You can reject a question in the **RECEIVED** tab and also in the **QUEUED** tab by clicking the **X** button next to the question. This moves the question into the **REJECTED** tab.