Engage Meeting Manager

User guide

Contents

1. Navigating the Engage Meeting Manager grid

The Engage Meeting Manager grid page has five sections, as shown in the figure below.
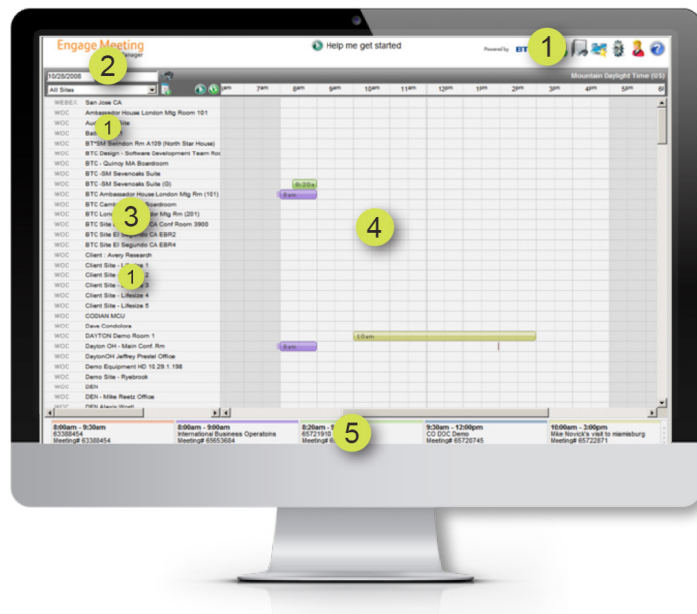

Figure 1: Engage Meeting Manager grid page

1.1 Menu

Shown in Figure 1 (with a 1) this section has several options.

Add a new meeting (right-click for template)
Click this icon to launch a wizard that guides you through the reservations process. Right-click to create a new meeting using an existing template.

Search meetings/my meetings
Run a report based on a range of dates you've chosen for all of the conferences you set up. Or, you can search for a list of conferences with specific words in the title. For example, you could search for all conferences in the past week with 'demo' in the conference name.

Edit site directories and favourites
Use this function to create a list of favourite sites. You can also create and save an unlimited number of custom directories.

Configure settings and preferences
In this area you can set your preferences for drag-and-drop on the schedule grid, change the way you view the date, change your time zone, and edit conference templates.

Contact support
Click here for the support desk phone numbers.

View online help file
Click here to open a help file.

1. Navigating the Engage Meeting Manager grid

1.2 Date and directory control

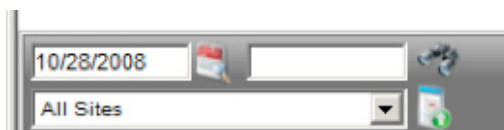In this area (noted by 2 in Figure 1) you can do four different things.

Figure 2: Date and directory control

Change date viewed in grid

When Engage Meeting Manager opens, today's date is in the grid. Click on the calendar icon to change the date displayed.

Change directory viewed in grid

If you have set a list of favourite sites, Engage Meeting Manager will open showing that list. If you don't, it will show all of the sites available to your login. In this area, you can choose to show any directories you've created.

Search by conference number

Click on the binoculars to search for details for any conference you know the conference ID number of.

Change sort options for site list

The order of sites in the list will appear alphabetically by company or site name, in ascending or descending order.

1.3 Site list

The list of sites (area 3 in Figure 1), shows sites that are in the database and are linked to your user login.

Sites only appear in the list if they're enabled for Engage by the service provider.

Right-click on the site list to expand your options:
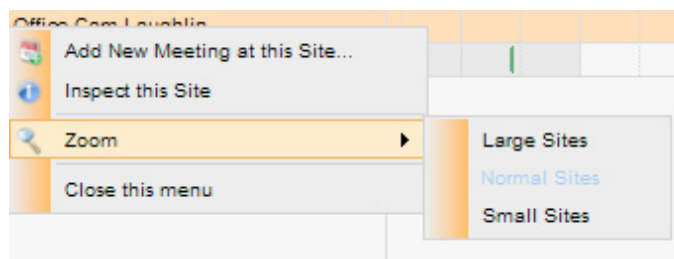
Figure 3: Right-click in the site list

Add new meeting at this site

Select to launch the new-reservation wizard.

Inspect this site

Select to pull up details regarding the site in report format.

Zoom

'Large sites' expands the size of the sites within the grid, making it easier to see start and end times.

'Smaller sites' lets you see more sites within the list without scrolling.

Close this menu

This closes the pop-up menu.

1. Navigating the Engage Meeting Manager grid

1.4 Grid

The bars in the grid (area 4 in Figure 1) represent reservations. A smaller, coloured area before the outlined bar indicates a set-up time. Hover over the bars to get basic information about the reservation. Times are shown in your preferred time zone.

Working directly in the grid

You can double-click in the grid to create a new reservation at the place and time you clicked. You can also drag-and-drop bars in the grid to edit reservations.
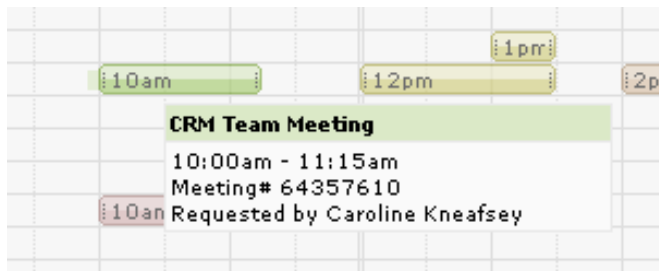

Figure 4: Hover over the bar for information

1.5 Daily meeting summary

Along the bottom of the page (shown in Figure 1) you'll find a list of meetings scheduled for the day. You can use the arrows to scroll through the list if you need to. Click on a meeting to edit the details directly.
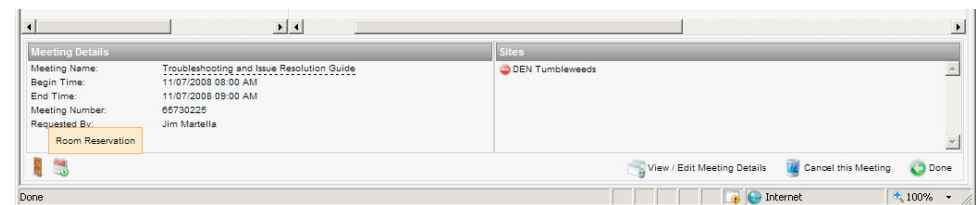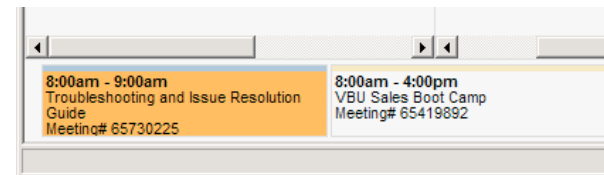

Figure 5: Work directly on the grid page

2. Creating custom directories

When you first use Engage Meeting Manager, the system will display all the sites available. If you have a large list of available sites, you may want to create a list of favourites or another custom list.

2.1 Create a favourites list

Click on the 'edit site directories and favourites' icon, located in the menu on the top right of the display.

Choose 'my favourites' in the drop-down.

Click on the sites in the list that you would like to show in your favourites list and then click on 'return to the schedule' grid.
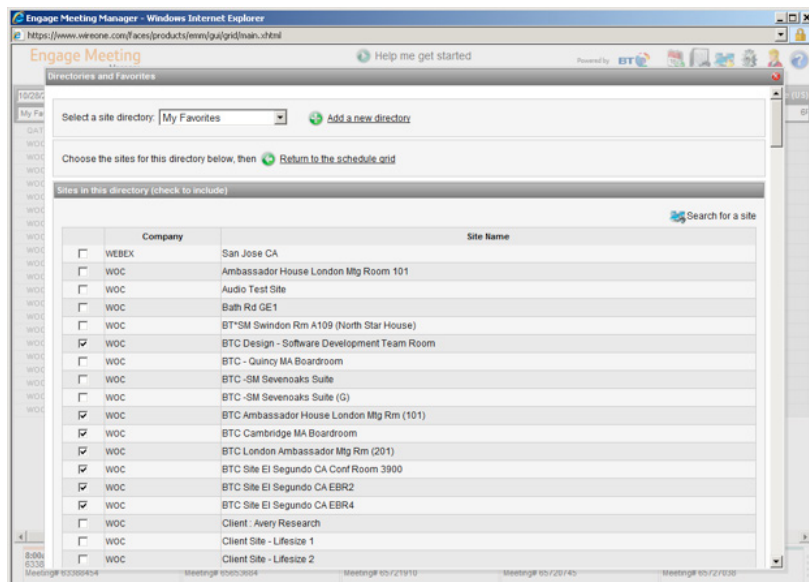
Figure 6: Create a favourites directory

2.2 Create a custom directory

To start, click on the 'edit site directories and favourites' icon, located in the menu on the top right of the display.

Add a new directory

Click on 'add a new directory' and a prompt will appear asking you to name your directory.

Figure 7: Naming a custom directory

As with your 'favourites', select the sites you want to be included in your custom directory and then click on 'return to schedule grid'.

3. Change user time preferences

Engage Meeting Manager defaults to a time zone and time display that matches where you normally are. You can change your time preferences if you want to.

3.1 Display company name on grid

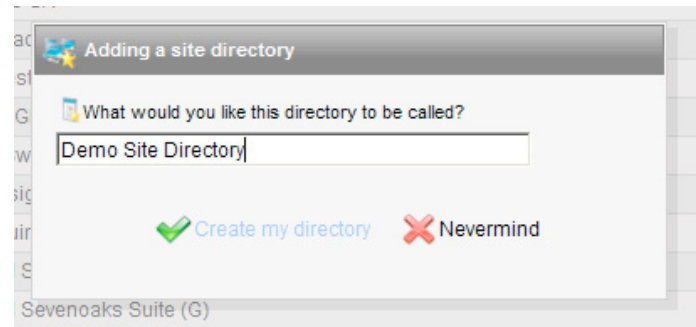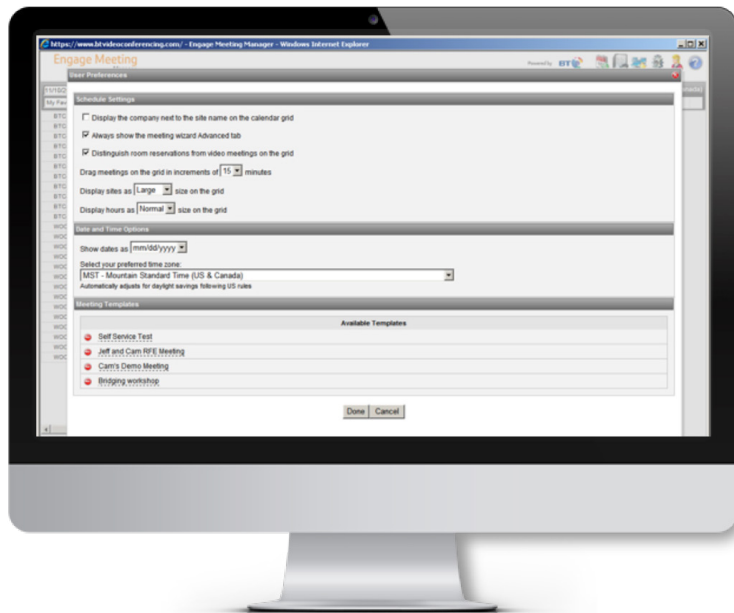You can choose to display a three-letter company code before the site name on the schedule grid. This might be helpful if you have a parent company that's made up of other individual companies. It's also helpful for companies with directories set up specifically for Global Video Exchange business-to-business reservations.

3.2 Always show 'advanced' tab

For ease of use, most users don't go on the 'advanced' tab which lets you select more technical features for a video conference. Engage Meeting Manager will skip over the 'advanced' tab unless you choose it; you can always get to it if you need to. If you're a technical administrator, you can choose to always show the 'advanced' tab which means the system won't skip this display step.

3.3 Schedule settings

When you drag-and-drop schedule bars on the grid, they snap to a time increment that's already set. It's set to 15 minute blocks unless you change this default and alter the size of display.

3.4 Date and time options

You can show dates in different formats and change the schedule view to a different time zone. This is useful if you're planning to travel and are booking reservations in different time zones; you can view the reservations in local time. You can also choose a date display format.

3.5 Meeting templates

This is the page for editing 'meeting templates'. You can book a reservation using a template where you've already saved the meeting name and included all of the relevant sites. When you book by template, you only need to change the date and time of the meeting; this is useful for meetings that don't have a set recurrence but always include the same sites.

4. Three ways to make a reservation

There are three ways to start the process to make a new reservation and all of them open the new reservations wizard.

1 Click on the 'new reservation' icon in the menu,

2 Double-click within the schedule grid, or

3 Right-click on a site name and then choose 'add new meeting at this site'.
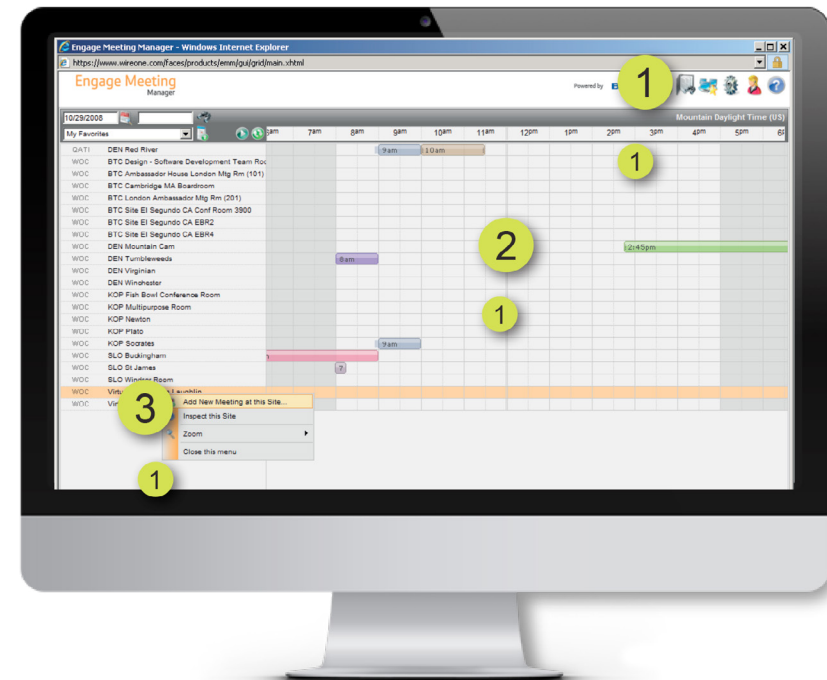

Figure 9: Three ways to start

5. New reservation wizard

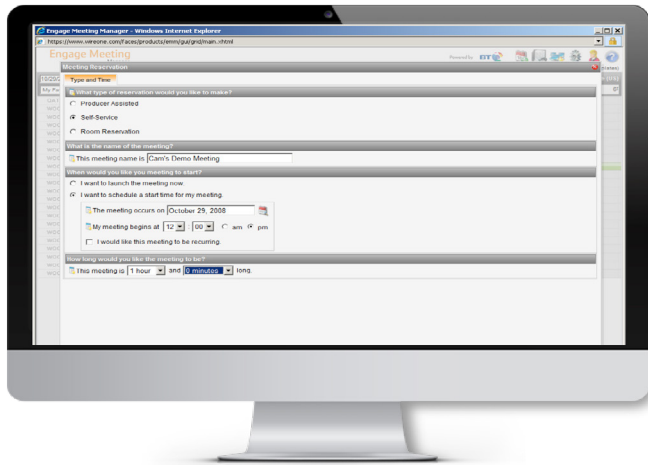Starting a new reservation launches the wizard that takes you through the process step-by-step and tab-by-tab.

Figure 10: Type and time tab

5.1 Type and time tab

Conference type

First, choose your type of reservation from a choice of three: producer assisted, self-service, or room reservation.

Depending on your company settings, you may see all of these choices or just two. If you hover over the words, a pop-up helper appears which explains what the choices mean.

Producer-assisted reservations

Choose this if you'll be using a conferencing producer to launch your call and then to provide monitoring.

Producer-assisted calls will always be bridged and Engage Meeting Manager offers more optional features for this type of call, like a meet-and-greet facility and recording.

Self-service reservations

Choose this option if you don't need the help of a conference producer.

Self-service calls automatically launch at the scheduled start time (or scheduled set-up time) and can be controlled via Engage Meeting Manager.

Self-service calls come with a few default options to help you:

- If you have Endpoint Connect enabled sites, Engage Meeting Manager will automatically choose Endpoint Connect for point-to-point calls.

- Engage Meeting Manager will choose Bridge Connect for any self-service calls with three or more sites, or if Endpoint Connect is not available.

- During the reservation process, if you're booking two sites and one of the sites is Endpoint Connect enabled, Engage Meeting Manager will ask if you plan on adding sites. If you choose 'yes', it will reserve your call as a bridged call so that you can add sites if necessary. Endpoint Connect calls are by definition un-bridged point-to-point calls.

5. New reservation wizard

Room reservation

Choose 'room reservation' if you need to book one or more sites but the call will not include video conferencing.

To prevent conflicts with video-enabled sites, reserve rooms even when you're hosting a non-video meeting. This means others won't be using video equipment when a meeting is scheduled in the same room.

Meeting name

You can see your meeting name on the grid but you can leave this blank if you want to. Some users do this to keep the topic of their meeting private. When the meeting name field is left blank the system will put in the unique conference ID number and this number will show on the grid.

Date and time

Launch now: Self-service calls can be launched immediately.

Future: You can schedule producer-assisted or self-service calls to launch at a date and time in the future. You must schedule producer-assisted calls at least one hour in advance of the start time.

Set-up time: This is taken care of by a default that's set by your company so there's no need to schedule it. If your company needs a 15 minute set-up time before each producer-assisted conference, and you want a conference to begin at 9am, you should choose 9am in Engage Meeting Manager. The system automatically adds a 15-minute block of time before 9am.

Recurrence: You can set your reservation to recur on a daily, weekly or monthly basis. Please note that you can edit individual instances of a reservation in Engage Meeting Manager. If you need to edit an entire series you'll need to cancel the series and rebook.

Figure 11: Recurring conference options

5. New reservation wizard

5.2 Sites tab

Select directory

On this tab, Engage Meeting Manager will always show the directory you were last viewing on the grid. You can choose a different directory using the drop-down list.
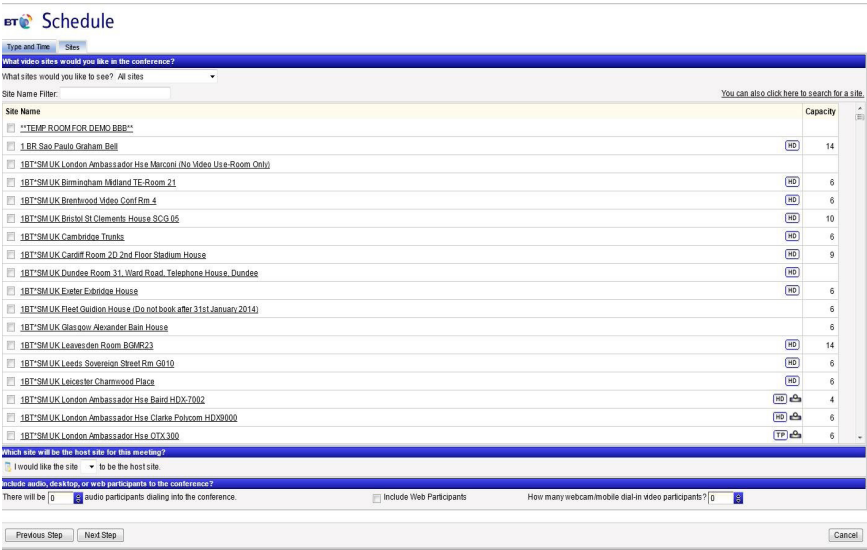

Figure 12: Adding sites

Site list: Only sites that are available at the chosen date and time will appear in this list.

Add sites: Click on the green '+' symbol to add a site to your reservation.

Remove sites: Click on the red '–' symbol to remove a site from your reservation.

Icons: Sites with special capabilities will have icons on the right.

HD: Means the site is equipped with an HD codec.

CTS: Means the site is a Cisco TelePresence suite.

Codec icon: Means the site is Endpoint Connect capable.

Host site: Engage Meeting Manager will make the first site you choose the host site. You can use the drop-down list to choose a different site.

Unified meeting: If you want to add audio and web participants to your video meeting this is where you select those options.

5. New reservation wizard

5.3 Account tab

Default account

Most users have their conferences charged to a single, default billing account. If you have more than one billing account to choose from then you can select the one you want to use on this tab via the drop-down list.

Billing allocations

You can add information about your conference to your bill. It's an optional feature and is highly-customisable.
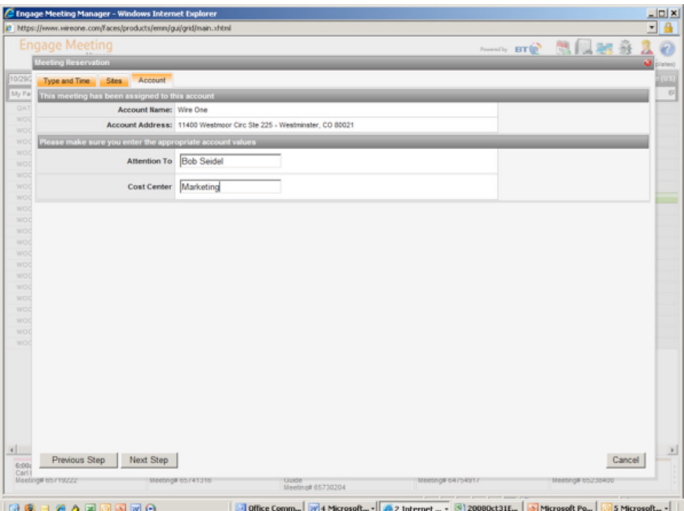
5.4 Preview tab

You can review the details of your conference before you create the meeting on the preview tab. If you need to change anything, click on the relevant tab to return to that step. Administrators can also change technical settings on the 'advanced' tab.
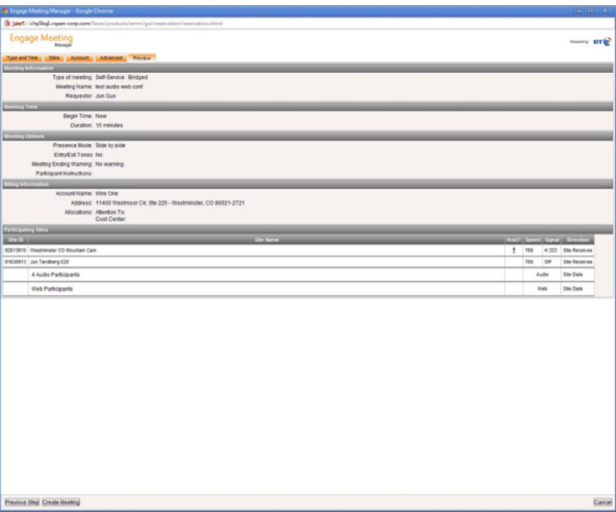

Figure 14: Preview your choices

Figure 13: Adding billing allocations

5. New reservation wizard

5.5 Advanced tab

The 'advanced' tab lets you change technical items that are set by default.

The conference features you can choose on this tab vary, depending on:

- whether your call is self-service or producer-assisted
- the type of equipment you're using
- your company's conference profile. For example, if your company has a policy that all conferences require a 15 minute set-up time, you won't be able to change that.

Set-up time

Change set-up time for any length of time up to an hour.

Greeting

Choose the type of conference-producer greeting you want (for producer-assisted calls only).

Auto-extend minutes

You can choose to have your conference automatically extended if you don't hang up at the scheduled end time.

Presence mode

You can choose from basic continuous presence modes. Please note that these modes depend upon the type of bridge you have and aren't available for Cisco TelePresence calls, which are only voice-activated switching.

Entry/exit tones

You can have a short tone play whenever a site joins or leaves your call.

Meeting ending warning

You can have a short tone play at a set time before the scheduled end of the meeting to remind participants that it's time to wrap up.

Participant instructions

This is a simple text field that's included in your meeting confirmations.

Change bandwidth options

You can change the speed, transport type, or dial direction of your call. These items will be set by Engage Meeting Manager based upon your company profile and will rarely be altered.
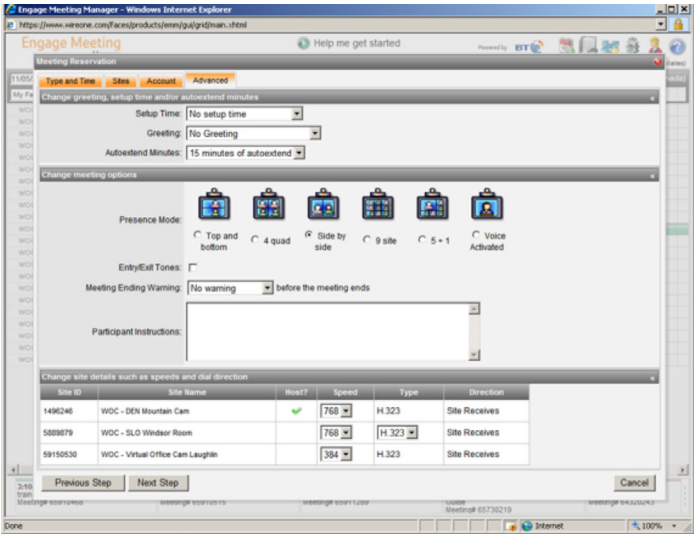

Figure 15: Advanced features for producer-assisted conferences

5. New reservation wizard

5.6 Controlling a self-service conference

If you use the new reservation wizard to book a self-service conference, you can use Engage Meeting Manager to control it.

If you booked your self-service meeting to launch straight away then the conference control panel will appear immediately. If you booked a self-service meeting for a future time, you'll be able to click on the meeting in the schedule grid and then click on 'take control of this meeting' at the bottom of the screen.
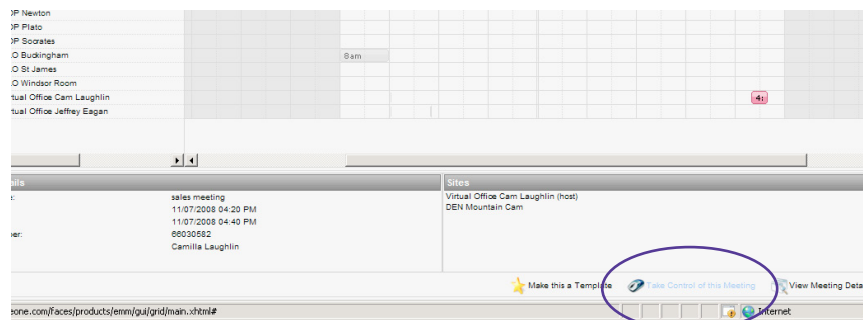

Figure 16: Taking control of a pre-scheduled call

5. New reservation wizard

5.7 Conference control panel

Self-service calls automatically launch at their scheduled start time without anyone doing anything. If you'd like to monitor and control a self-service call you can use Engage Meeting Manager's control panel.

View conference information

Your conference ID number is displayed and so is a ticker that counts down the time remaining in your reservation.

Extend conference

You can add extra time onto your conference (providing it won't run into time that's already been reserved by someone else).

Change mode

You can change continuous presence mode on-the-go if your bridging equipment offers continuous presence.

View Remote Equipment Monitoring (REM) status

If your endpoint is monitored by REM then an icon under 'status' will show you its current health. Hover over the icon for more information.

Participant

You can click on a site name to view details about that site.

Mute

Mute or unmute individual sites.

Control

Connect or disconnect individual sites.

End conference
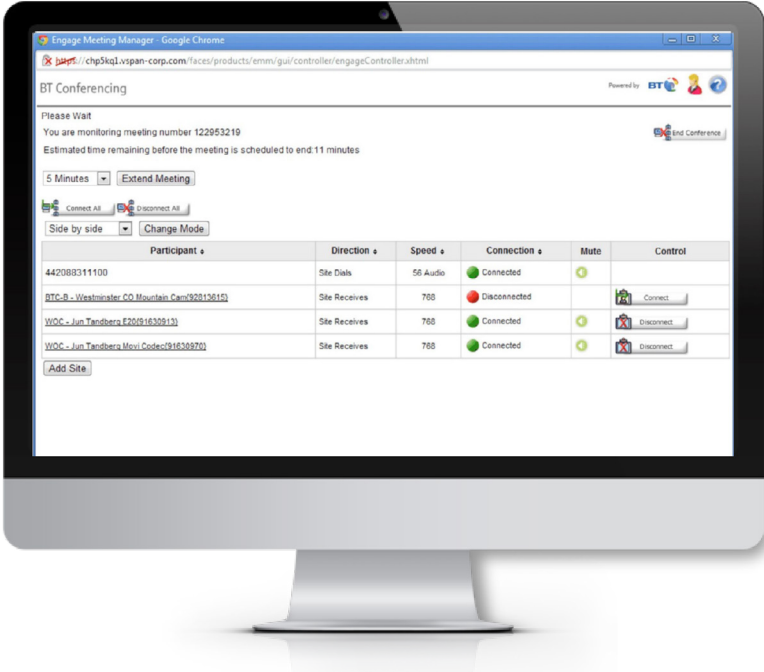
Disconnect all sites and end the conference.

Figure 17: Conference control panel

6. Troubleshooting

6.1 Troubleshooting a self–service conference

Engage Meeting Manager's automated technology steps in to help when a conference doesn't launch at the scheduled start time (usually it's to do with the endpoint of your call. These tips will help to make sure that your conferences run smoothly.

Set-up time

Use the optional five minute set-up time offered through Engage Meeting Manager. If your conference isn't connecting, check a few common problems first:

- double-check the conference start time, especially for am/pm confusion

- make sure there's power to the monitor

- verify channel/input on monitor

- check the volume levels on both the monitor and the endpoint

- make sure there's power to the codec

- write down the error code for the connection, if any

- reboot the codec

- try to change the dial direction

- make a call to equipment you know is working.

Auto redial

Engage Meeting Manager will continue to try to connect sites for the first 15 minutes of the scheduled call. This allows time to turn on systems or reboot endpoints in order to clear errors.

6.2 Troubleshooting the Engage Meeting Manager application

Specific browser versions and the stability of your internet connection may affect how your Engage Meeting Manager works.

Display issues

Periodically, it might appear as though some data hasn't loaded on the grid or schedule bars may 'ghost' and overlap. This might be the result of a slow network connection and is usually fixed by refreshing your browser or by re-launching Engage Meeting Manager from the portal page.

Calling support

Before you put in a call for support please make a note of your browser type and version as well as any other details related to the error.

7. Confirmation and scheduling system integration

Engage Meeting Manager automatically shares information with enterprise email and scheduling clients such as Outlook and Lotus Notes.

7.1 Confirmation email

The confirmation email shows all the information needed to host and attend the conference. It also gives the location of each video participant as well as the time of the conference in the participant's time zone. Audio participants are provided with the dial-in phone number to join the conference. Many hosts choose to forward this email to conference participants.

7.2 Confirmation iCal

Customers may choose to include an iCal for the meeting in the confirmation that is sent to the meeting organiser. This creates meeting invitations in email/calendar systems such as Microsoft Outlook. You can only edit or cancel meetings within Engage Meeting Manager and, currently, Outlook doesn't communicate back to Engage Meeting Manager.

Our helpdesk is available 24/7, 365 days a year.

Find the contact details for your region at www.btconferencing.com/contact-us

BT

Offices worldwide