

ESI Enterprise Meetings<sup>™</sup> delivers an unparalleled video conferencing and meeting experience with crystal clear audio and video. This guide will help users get started and help answer common questions.

While this document has great information and direction on Enterprise Meetings, you may find additional information by selecting Help under your account avatar, which will direct you to <u>https://support.meet.esi-estech.com/support/home</u>.

## Contents

License Package Options
Getting Started4
Activation4
Overview
Starting Screen5
Start a meeting6
Schedule a meeting6
View scheduled meetings7
Join a meeting7
Profile
Meeting link
Audio conference details9
Team Chat9
Drive
Settings Menu10
Settings
Recordings11
Meeting details
Download Apps12
Connection test
Help12
Sign out12
Logging out13
Google Calendar Plug-In
Microsoft Outlook integration setup
Installing the Outlook add-in

16
17
18
18
18
18
19
19
20
21
21
22
22
23
27
33

# License Package Options

Licensing consists of two package options, Basic and Pro. See chart below.

Feature	Basic	Pro
Video Meetings and Calls (Max. Participants)	100	250
Virtual Background	Yes	Yes
Screen Sharing	Yes	Yes
Polling	Yes	Yes
Document Sharing	Yes	Yes
Annotation and laser pointer	Yes	Yes
Whiteboard	Yes	Yes
APIs	Yes	Yes
Webhooks	Yes	Yes
Audio Recording <sup>1</sup>	No	Yes
Video Recording <sup>1</sup>	No	Yes
Meeting Lock	No	Yes
Secure Meeting Access	No	Yes
Moderator Controls	No	Yes
Unique Participant Codes	No	Yes
Private Chat	No	Yes
Breakout Rooms	No	Yes
Stage View	No	Yes
Call Out to Participants	No	Yes
Dual Monitor Support	No	Yes
Live Streaming <sup>2</sup>	No	Yes
Instant Breakout	No	Yes
SMS Invitations & Reminders	No	Yes
Cue Meeting Transcription & AI Insights	No	Yes

<sup>1</sup> If recording is stored in Cloud servers, there is an additional charge. 1GB of storage per account is included.

<sup>2</sup> Additional charge.

# **Getting Started**

You will receive a Welcome email with instructions on how to proceed to start using the Enterprise Meetings application. Follow the instructions, set your password, etc.

## Activation

1. You will receive an email to activate your account.

esi Enterprise Meetings
Hello Gary H,
Welcome to ESI Enterprise Meetings!
Your account is now set up and ready to use! Please save the information below to access your account at any time.
Need help? Please visit Support.
Enjoy!
Your Account Details:
Company name: ESI Test
Company URL: esi-test.meet.esi.com
Your email: <u>gh@esi-estech.com</u>
Activate your account

2. You will be asked to change your password. Enter a strong password. When you click in the New password field Google Chrome may offer to create a strong password for you or you can type your own password. Be sure to check that you agree to the terms and conditions before proceeding.

(esi)				
Please enter a password to set for your new account.				
<ul> <li>one number</li> <li>one lowercase character</li> <li>one uppercase character</li> <li>8 characters long</li> </ul>				
New password	Ø			
Repeat new password				
I have read and agree to the terms and conditions and privacy policy.				
Create Password				

3. When you click Create Password, you will enter the starting screen.

# Overview

# Starting Screen

When you start Enterprise Meetings you will land on the starting screen Meet tab by default.

esi)	Ö	<b>,</b>			Gary H gh@esi-estech.com ☰
	Meet	Team Chat	Drive		14
	0	Ø	ß	B GH Hi Gary H!	
				est-test.meet.est.com/com/cal/1234507	
	1	<b>STAF</b>	रा •		L
		4 Pa	st	5 Today 6 Upcoming	
	Thurs	day, March 20, 9	9:51 AM		
	7 Gar	y H Meeting		10:00 AM ③ in progress Stat	rt 🔻

On the starting screen Meet tab you will find:

- 1. **START**: Starts an on-demand meeting.
- 2. **SCHEDULE**: Schedule a meeting.
- 3. **JOIN**: Join a meeting in progress.
- 4. Past: Meetings that occurred in the past.
- 5. **Today**: Meetings that are scheduled for the current day.
- 6. **Upcoming**: Future meetings.
- 7. Meeting logs: Displays a list of Past, Today's or Upcoming meetings.
- 8. Profile: Your profile is the green box that contains your initials.
- 9. Meeting link: Click the meeting link to copy it and share it with meeting participants.
- 10. Audio conference details: Click to see meeting details.
- 11. Meet: You can start, schedule join, and see scheduled meetings on this tab.
- 12. Team Chat: You can start a chat session by clicking on this tab.
- 13. Drive: You can upload recordings and files for the meetings by clicking this tab.
- 14. Settings: Click the three horizontal lines in the upper right corner to open settings.

You can always click the ESI logo in the upper left corner to go back to the starting screen.

## Start a meeting

At the starting screen, click the START button to start an on-demand meeting.

Or click the down arrow next to the start button and select one of the options for starting the meeting. Once meeting has started ere you can invite participants to join.

START	SCHED	ULE	
Past	<ul> <li>Screen share without audio</li> <li>Without audio</li> </ul>		Upcoming
Thursday, March 20, 11:27 AN	Join settings Join with video on	oday	

# Schedule a meeting

- 1. At the starting screen click **SCHEDULE** 
  - Enter a Title for your meeting this is optional, but is helpful for your participants and for yourself to find meetings back within your account using the search function.
  - Choose a date, time and duration.
  - Add an optional Description (Agenda) if required.
  - **Recording** set your conference to be automatically recorded.
  - **Transcription** have your meeting automatically transcribed by our AI bot 'CUE'. Includes automatic topic tags and keyword search.
  - Set up a Recurring Meeting by clicking on 'Set to repeat' with daily, weekly or monthly options.
  - International participants? Just select **Timezones** on the first screen of the scheduling process, then click the plus sign to add another location. This will allow you to choose the best option for all invited parties.
  - **Security Settings**: Create a randomly generated one-time access code unique to this conference call.
- 3. Add PARTICIPANTS
- 4. Choose DIAL-IN NUMBERS
- 5. SUMMARY
  - Once you have confirmed the details are correct, click 'Schedule'.
  - You and all those added as participants will receive an email invitation with the access code for your account, along with all the details they need to join your conference.

Test Meeting					
ate & time					
Thu, Mar 20, 2025	📋 1:45 PM	~	CDT	1 hour	
escription					
Enter a description (optional)					
() Sat to reneat	urity settings	on mode			
O Secto repeat					

15 minutes before the scheduled start time all invitees will also receive an automatic reminder email.

## View scheduled meetings

View a list of your past meetings, today's meetings or upcoming meetings. You can click the blue start button to start a meeting immediately.

You can click the drop down arrow next to a scheduled meeting to select additional options for starting the meeting.

Past	Today		Upcom	ing	
hursday, March 20, 3:11 PM					
Test Meeting		3:15 PM	() in progress	Start	•
					🖵 Screen share without audio
					▲× Without audio

## Join a meeting

- 1. At the starting screen, click JOIN.
- 2. Enter the access code, provided by the meeting coordinator.
- 3. Click the blue Join button to enter the meeting.

JC	DIN ANOTHER MEETING	×
	Enter access code	
	Cancel Join	•

# Profile

You can upload a picture to your profile.

1. Click the green profile box.



2. Select a picture file and click Upload. The file must be JPG, PNG or GIF.

UPLOAD YOUR PICTURE	×
Drop picture here	
Accepts JPG, PNG, or GIF	
It's best if the picture is the same length and height	
Select file	
	······
Clo	se Upload

# Meeting link

The meeting link is located just under your profile. You can copy the link by clicking on it. Then you can send the meeting link to participants by pasting the link into a chat, email, etc.



# Audio conference details

Audio conference details link is located just under the meeting link. You can click the link to:

- View meeting details
- Copy meeting details
- See Dial-in numbers
- View phone control key codes
- View ESI Enterprise Meetings online support page

GARY H MEETING ROOM		×
<ul> <li>Dial-in: +1 555 555-5555</li> <li>Access code: 1234567 (1) Moderator PIN: 7654321 (1)</li> <li>Online meeting room: esi-test.meet.esi.com/conf/call/1234567</li> </ul>	Copy details Copy details Dial-in numbers Phone controls Support	
	Clos	je

# Team Chat

Click the Team Chat tab to start a chat session. You can start a conversation with someone or create a channel for a group of participants.

🔄 💬		
ESI Corporate 🌣 Team Chat		
✓ DIRECT MESSAGES	+	
No messages yet		
✓ CHANNELS		Start a chat or join a channel to get started
		Click $(+)$ to start a conversation with someone.
		Click to join or create a new channel.

# Drive

Search for shared files, recordings and upload files from meetings to the Enterprise Meetings drive.

			Drive			
ES	SI ENTE	RPRISE	E MEET	TINGS DRIVE		
Tot Rec	tal storage us cordings: 0 B	sed 0 Bytes sytes   Libra	ary: 0 Bytes	Shared: 0 Bytes 🚯		
	R	ecordings		Library	Shared	Trash
Το ι	upload files to	your conter	nt library, go	to Dashboard > Drive > <u>Content Librar</u>	ry.	
C	২ ।					辈 Go

# Settings Menu

While this document has great information and direction on Enterprise Meetings, you may find additional information by selecting Help under your account avatar, which will direct you to <u>https://support.meet.esi-estech.com/support/home</u>.

Click the three horizontal lines in the upper right hand corner to view the settings menu.



From here you will be able to:

- Open settings menu, where you can set up account profile, Meeting mode, and PIN-less entry & SMS notifications
- Open ESI Enterprise Meetings Drive where you can store files and listen to recordings
- Open meeting details, view phone control key codes and dial-in numbers
- Download Enterprise Meetings apps for Windows, MacOS, iOS and Android
- Perform a connection test (call diagnostic test)
- View the ESI Enterprise Meetings help page
- Sign out of Enterprise Meetings

GH Gary H gh@esi-estech.com	
Settings	>
Recordings	>
Meeting details	>
🛓 Download apps	>
	>
🕲 Help	>
〔➡ Sign out	>

### Settings

- Account & Profile: Set up your profile and account preferences. This includes:
  - **Picture**: Add a picture to your profile.
  - **Password**: Change your sign-in password.
  - **Two-factor authentication**: Enable two-factor authentication for additional security.
  - **Time zone**: Set your time zone.
  - **System notifications**: Be notified about new messages and meeting requests.
  - Account settings: Set dashboard type (audio/video) and time and date format.
  - Audio & video settings: Select your default speaker, microphone and video device.
  - **Virtual backgrounds**: Select a background that other meeting participants will see. You can also upload custom backgrounds to use.
- **Meeting mode**: Select a meeting mode. Available meeting modes are:
  - **Conversation / Collaboration mode**: All participants join the meeting unmuted and have full access to all sharing tools.
  - **Q&A/ Classroom mode**: All participants join the meeting muted, but can unmute themselves and have restricted access to all sharing tools.
  - Presentation / Webinar mode: Presenter needs to ensure viewers cannot disrupt or interfere. Easily switch to another mode or unmute individual participants at any point for questions or feedback from viewers.
  - **Focus mode**: Prevent distraction from other participants and direct all attention to your presentation or training session.

From Meeting mode you can also set up:

- **Waiting room**: With the waiting room enabled, your meeting will not begin until a moderator joins.
- Hold music playlist: This is the music played to participants in your meeting room while they are waiting for the meeting to start. You can select from the curated music playlist or upload custom music.
- Chimes & name announce: You can enable entry/exit chimes and name announce.
- **Primary dial-in numbers**: The numbers selected will be displayed in dial-in instructions and invitations to participants.
- **Moderator pin**: The Moderator PIN is for audio conferences using a dial-in number.
- Access code: This is the entry key to your meetings for you and all your participants.
- **Security**: You can select security measures for you meeting.
- **Recording & live streaming**: Manage the recording and live streaming settings for your account.
- **PIN-less entry & SMS notifications**: Add your phone number, and when you call into a meeting from this number, you'll be recognized automatically: Here you can set up:
  - **Meeting invitations**: Choose what style of meeting invitation emails you would like to be sent.
  - **Email notifications**: Choose to send meeting reminders, meeting summaries and cue transcription summaries.

#### Recordings

Search for shared files, recordings and upload files from meetings to the Enterprise Meetings drive.

#### Meeting details

Here you will find the dial in number, access code, meeting room URL and phone control codes.

## **Download Apps**

Get ESI Corporate apps on desktop and mobile. Organize and join your online meetings from any device! You can download apps for Windows, MacOS, iOS and Android.

## **Connection test**

Run a connection test to verify that your device and network are able to have an online meeting.

#### Help

Clicking Help will take you to the Enterprise Meetings knowledge base where you can find answers to frequently asked questions.

#### Sign out

Click Sign out to log out of Enterprise Meetings. After you sign out, you will be presented with the option to log back in or join a meeting.

# Logging out

If you choose to sign out of Enterprise Meetings rather than to remain logged in, click the three horizontal lines it the top right corner of the screen  $\blacksquare$ . Here you will find the option to sign out.

Gary H gh@esi-estech.cor	,≡
MENU	×
GH Gary H gh@esi-estech.com	
Settings	>
Recordings	>
Meeting details	>
📥 Download apps	>
	>
🕲 Help	>
<b>[</b> → Sign out	>

After you sign out, you will be presented with the option to log back in or join a meeting.



# **Google Calendar Plug-In**

- 1. Install the Google Calendar plug-in following these instructions:
  - a. Click on the plus sign to the right of your Google calendar (see the plus sign circled in red in the image on the right).



b. Now search for ESI Enterprise Meetings in the pop-up window:



c. Click on the ESI Enterprise Meetings app and follow the instructions to install the plug-in. Once the installation is complete, the newly installed camera shaped plug-in will appear on the right hand side menu of your Google calendar (see the camera shaped icon circled in Green in the image on the right).



d. Click on the plug-in icon and log in with your Enterprise Meeting credentials. You may have to refresh your browser after that.

You should now be able to see the Enterprise Meeting option when scheduling a new meeting from the drop-down menu as shown below.

=	×
	Add title
	Event Out of office Task Appointment schedule New
0	Monday, March 31 11:30am – 12:30pm Time zone • Does not repeat
90	Add guests
	Add Google Meet video conferencing 👻
$\odot$	Add rooms or location Google Meet
≡	Add description or a Google Drive attai
	Gary H  Busy • Default visibility • Notify 10 minutes be ADD-ONS
	ESI Enterprise Meetings

# **Microsoft Outlook integration setup**

Easily add your ESI Enterprise Meeting details to any event you schedule using your outlook calendar.

## Installing the Outlook add-in

Verify that installing add-ins is permitted by your Office 365 admin.

Go to the Microsoft App Store.

Search 'ESI Enterprise Meetings' and click the result. Link: <u>https://appsource.microsoft.com/en-us/product/office/wa200007098</u>

Click Get It Now.

Follow the Microsoft App Store prompts to complete the installation.

## Scheduling a meeting

Open your Outlook web calendar and click New to create a new calendar event.

Enter meeting details and click the three dots in the top toolbar.

You will see ESI Enterprise Meetings appear in the sidebar select this and you will be prompted for your ESI Enterprise Meetings credentials.

Click 'ESI Enterprise Meetings' > Add ESI Enterprise Meeting

# **Mobile Application**

1. Download the mobile application for your iOS or Android mobile device. This will allow you to schedule or join Enterprise Meetings using your mobile device.



2. Log in to the mobile app using your Enterprise Meeting credentials.

# **Frequently Asked Questions**

While this document has great information and direction on Enterprise Meetings, you may find additional information by selecting Help under your account avatar, which will direct you to <u>https://support.meet.esi-estech.com/support/home</u>.

## Phone

### How do conference calls work?

Conference calls work by having each participant call a 'dial-in' phone number and then type in an 'access code'. Start an on-demand teleconference using the following steps:

- 1. Copy and share your conference details, letting everyone know the date/time to join.
- 2. Host: Call the preferred dial-in number.
- 3. Enter Moderator PIN followed by the # key.
- 4. Participants: Call the preferred dial-in number.
- 5. Enter access code followed by the # key.
  - Use the same call-in details for all future calls.
  - No need to login to your account.
  - Participants can join via web or phone and will all be connected in the same conference call.

## How Do I Record My Conference?

- 1. Call the dial-in number
- Enter your moderator PIN followed by the # key (You can find your moderator PIN via 'Dial-in information')
- 3. Press \*9 to begin recording
- 4. Everyone will hear a message that the call is being recorded (This is so that we adhere to privacy and GDPR regulations)
- 5. Press \*9 again to stop/pause the recording at any point
- 6. The recording will automatically end when your conference ends and an email with an mp3 download link and playback information will be sent to the host. The same details can be found in your account via the right-hand menu under 'Recordings' and also via 'Past' calls.

NOTE: Only hosts/moderators can initiate recording. More than one person can use the moderator PIN.

## How do I conduct an international conference?

Our service offers a selection of dial-in numbers around the world that are "in country"; callers would pay only their local fees to reach the conference line. There are also international Toll Free Numbers available to ensure that callers are not charged any fees.\* To access these numbers, just log into your account, then on the main Conference page click "More" next to your assigned dial-in number. Here you will see a list of numbers. Provide these dial-in numbers to your international participants, along with the rest of the relevant call information. Those parties would dial in just like any other call participants, but using the international dial-in number assigned to their country (callers in countries not listed can dial into any of the US-based dial-in numbers, using their usual country calling codes).

Add any of these numbers to your list of Primary Dial-in Numbers by going to Settings, typing in all or part of the country name, then highlighting that country and hitting Save. International numbers added to your account in this manner will automatically appear on any conference invitations you send through our site.

\*Additional per minute charges apply.

### How does Caller Display work?

Hosts can **view the full caller number** of participants who join via phone. You can also **add contacts** to your address book directly within your online meeting room during a conference.

- Add a name to your telephone participants so you know exactly who is in your meeting and who is talking.
- Save a contact phone number directly to your address book so you know exactly who is connecting in your conferences on future meetings.
- See the names of who was present in each meeting in the email summary.
- Search names using the 'Smart Search' feature in your account and see which meetings your contacts have attended (*not available with every subscription*).

\*NOTE: Only moderators will be able to view full caller numbers and only moderators who are logged into their account (i.e. not someone who was made moderator by the host/organizer) will have the ability to edit contacts.



#### Participant information

Click number to add to contacts

#### How does it work?

- If you have already added phone numbers to contacts in your address book, as people join your conference via phone, you will be able to see their name displayed from what you already entered in your address book.
- While in the online meeting room as moderator, just open the participant list and click on the phone number of one of your attendees and you will be given the option to add a name to a new or existing contact in your address book. Hit 'Save' to confirm the changes.
- Phone participants will have a handset icon below their name or number and any web participants will have a computer icon below their names.

#### How do Moderator Controls work?

#### **Telephone Conference Controls:**

Available to all callers:

\*2 Raise or lower your hand

\*6 Mute or unmute your line

Available to call moderators only:

- \*5 Meeting Lock
- **\*7 Toggle Mute Mode** (see below for details)
- \*8 Toggle entry and exit chimes
- \*9 Start and stop recording
- \*0 End Conference

A view of the star codes can be found while in a call:

(9) 01:53 🛃 1	<b>A</b>				
				_	
		MEETING DETAILS 🥥	×		
		Julia K jk@esi-estech.com	Sign out Go to dashboard	PHONE CONTROLS	X tile dialed into the meeting from your phone.
		https://esi.meet.esi.com/conf/c81/64211212 (2) Dial-in number: +1.46902 53/5 Access.code:	D Copy details Dial-in numbers	e O End meeting     2 Raise or lower your hand     3 Enter or leave breakout room     4 List commands	Mute or unmute your line     Toggle mute mode     Toggle entry and exit chimes     Start and stop recording
		Title: Julia K's Meeting		•5 Lock or unlock the meeting	
Meeting details	Julia Kedward's Meeting	Encryption: Enabled 🥥 Learn more			Back Close
<ul> <li>Settings</li> <li>Change recording layou</li> </ul>		v2.6.336.8	Close		
<ul> <li>Change background</li> <li>Disable incoming video</li> </ul>					
Show live captions					
		↓   ∧   ⋈   ∧   ⊕	×		

#### Available Mute Modes:

**Conversation Mode**: Default mode where all participants may speak, mute or unmute themselves by pressing \*6.

**Q&A Mode:** All participants are muted and have the ability to unmute themselves individually. **Presentation Mode:** All participants are muted and can only be unmuted by the moderator.

#### Set a default Mute Mode for all calls:

The default mute mode for all your calls can be set from within your account. Go to 'Settings' and then select 'Moderator Add-On' and click on your preferred default mute mode.

\*Note that this new setting will only apply to calls that take place or are scheduled after you changed the setting. To change the default mute mode for calls already scheduled, you would need to cancel and reschedule them to have the new setting applied to those calls.

#### Moderate the call from your computer:

If you would like to moderate your call from your computer, under the 'FAQs' section, you will find the article '*How can I Manage my call Online?*' which explains how you can manage your conference via the Online Meeting Room.

## Web

### How do I schedule a conference?

- 1. Sign in to your account
  - Use the link in your activation email
- 2. Click SCHEDULE
  - Enter a Title for your meeting this is optional, but is helpful for your participants and for yourself to find meetings back within your account using the search function.
  - Choose a date, time and duration.
  - Add an optional Description (Agenda) if required.
  - **Recording** set your conference to be automatically recorded.
  - **Transcription** have your meeting automatically transcribed by our AI bot 'CUE'. Includes automatic topic tags and keyword search.
  - Set up a Recurring Meeting by clicking on 'Set to repeat' with daily, weekly or monthly options.
  - International participants? Just select **Timezones** on the first screen of the scheduling process, then click the plus sign to add another location. This will allow you to choose the best option for all invited parties.
  - **Security Settings**: Create a randomly generated one-time access code unique to this conference call.
- 6. Add PARTICIPANTS
- 7. Choose DIAL-IN NUMBERS
- 8. SUMMARY
  - Once you have confirmed the details are correct, hit 'Schedule'.
  - You and all those added as participants will receive an email invitation with the access code for your account, along with all the details they need to join your conference.
  - 15 minutes before the scheduled start time all invitees will also receive an automatic reminder email.

## Can participants join an online meeting from an iPhone or iPad?

Yes! Participants can join a video conference within Safari or using our mobile app.



**Note:** iOS 13 and later is required for video to be available. With devices running iOS 12 participants can still share their audio and of course hear other participants, however video will not be available.

#### How do I share my screen with others?

Our screen sharing service works right inside your browser using WebRTC technology. There is nothing to download and no need for your participants to register anywhere in order to view your screen or shared documents.

- 1. Ensure you have Google Chrome, Safari, Firefox or one of our Desktop Apps installed
  - Windows, Mac or Linux computer required
- 2. Join your Online Meeting Room
  - Click 'Start' from your account dashboard in Chrome or the App; OR
  - Paste your meeting room link in your Chrome browser
- 3. Click the 'SHARE. button at the bottom of your Online Meeting Room
  - Older browsers will require an extension to be installed. Click 'Add Extension' and follow the instructions
- 4. Choose what you want to share
  - Entire Desktop best for PowerPoint slide decks
  - One Application useful if you want to ensure viewers only see one specific document
  - A Google Chrome tab easiest for sharing a website in Chrome
- 5. Exit Screen Sharing
  - Click the 'SHARE' button at the bottom of your Online Meeting Room; OR
  - Click 'Stop Sharing Screen' in the center or bottom of your online meeting room

It is also possible to **upload a document** to present via the chat box on the right hand side. This is the best option for smaller groups and animated PowerPoint presentations.

**Participants**: For participants to be able to view your shared screen, they only need to call in via their browser as they would for a video call.

### How do I get the one-time access code?

#### For Scheduled Conferences

If you have an important call and you want to ensure it is private, just select the '**Security Settings**' option when scheduling your call. This option can be found at the bottom of the first 'Schedule a conference' page and will give you the option to randomly generate a one-time access code to be used just for that particular scheduled call.

You will also have the option to add an additional layer of security by choosing your own 'Security Code' just for this meeting. Callers will be prompted to enter this after the access code has been accepted. For scheduled calls, this feature can only be used in combination with the one-time access code.

The one-time access code will be sent to all invitees, along with the regular conference dial-in number/s and meeting URL. Participants will only need to enter this code instead of your regular code after calling the usual dial-in number.

\*\*The one-time code will be active 15 minutes before the scheduled start time.

() SCHEDULE A MEETING						
Title						
Gary's Meeting						
Date & time						
Tue, Feb 4, 2025	Ċ	5:00 PM	~	CST	1 hour	~
Description						
Enter a description (optional)						
Set to repeat Timezones	Security settings	Conversation/Collaboration	n mode			18
Default recording preference Audio & v	ideo 🗸					
Automatically record						

#### **Default for all Meetings**

Via the settings section in your account, select '**Security Settings**', then under 'Meeting room access code' choose 'Personal meeting room' and click Save. This will set ALL of your scheduled meetings to have a unique access code as your default preference.

P SEC	CURITY SETTINGS
1.1	Meeting room access code
0	Personal meeting room
	Use the same access code (3919773) for each scheduled meeting.
0	Generate automatically
	Use a random access code for each scheduled meeting.
2. 6	Passcode
0	No passcode
0	Shared passcode
	Add an extra layer of security to all meetings.
	Unique meeting passcodes
	Additional security is only available when using an auto-generated access code.
	Add a unique code for each participant in a scheduled meeting. Uninvited attendees will be blocked from entering.

#### Join a video conference using the one-time security code

- Schedule a conference using the one-time access code security setting
- Conference organizer:
  - o Login to your account online
  - o Click 'Start' and ensure that you select the scheduled meeting

WHAT WOULD YOU LIKE TO S	TART? X
() Start ne	ew meeting
c	R
JOIN AN ACTIVE MEETING	
Enhancement Review 💡	() in progress >
Gary's Meeting	() in progress >

 $\circ$   $\,$  OR Click on the relevant meeting in the 'Today's calls' section

START -		SCHEDULE	NIOE		
Past		Today	Upcoming		
Wednesday, February 5, 10:32	AM				
Enhancement Review 💡			9:45 AM () in progress Join -		

o OR Go to the 'Upcoming' section and click on the relevant conference

START -	SCHEDULE		
Past	Today	Upcoming	
	FEBRUARY 2025	March 2025 >	
G ENHANCEMENT RE 9:45 AM - 10:00 AM   + Julia	VIEW 🖓 C	Julia invited you to this meeting.	

### • Participant:

- o Open the email invitation or reminder for the scheduled meeting
- o Click on the meeting link in the email
- If a participant adds the meeting to their calendar, they can also click on the meeting link in their calendar to join.

#### Security Code

#### Default for all meetings

Via the settings section in your account, select '**Security Settings**', enter your own preferred shared passcode that participants will be prompted to enter when calling using a phone and also via a pop-up message when they join via web. This will add another layer of security for situations where discretion and privacy are required.

SECURITY SETTINGS	
1. Meeting room access code	
O Personal meeting room	
Use the same access code (3919773) for each sch	uled meeting.
Generate automatically	
Use a random access code for each scheduled me	ing.
2. Passcode	
O No passcode	
Shared passcode	
Add an extra layer of security to all meetings.	
12345	×Clea
Unique meeting passcodes	
Add a unique code for each participant in a scheo	ed meeting. Uninvited attendees will be blocked from entering.

## How to stream to YouTube?

Note: Live Streaming incurs a usage fee of \$0.03/per minute.

#### STEP 1: Linking to your YouTube Account Enable Live Streaming:

- Sign in to your YouTube account
- On your desktop computer, click the CREATE icon at the top right of your YouTube account and select 'Go live'
- If you haven't already set up your YouTube account to Livestream, select '**Stream**' and fill out the details for your channel.
- A page will display as pictured below, copy both the stream key and stream URL.

s	Stream setup help					
		0				
1	Download and set up your streaming software Learn more about streaming software					
2	Paste the stream key into your software Stream key (paste in encoder)	СОРҮ				
	You may also need: Stream URL rtmp://a.rtmp.youtube.com/live2	СОРҮ				
3	In your streaming software, start sending us your video stream					
4	Click "Done" and then click "Go Live" to start streamin	ng				
		DONE				

Add your YouTube streaming details to your Enterprise Meetings account:

- Go to Settings > Recording & Live Streaming > Toggle On
- Paste in your streaming key
- and share URL and click save.
- If you wish to record all meetings, but do not wish to stream ALL meetings, note that you will need to stop and restart recording in order to live stream in the online meeting room.

**Note:** From time to time YouTube will update these settings, so it is suggested that you confirm these details before each live streaming event.

🥵 📩 🛱 🗩		
Account & profile	>	RECORDING & LIVE STREAMING
Picture	>	Manage the recording and live streaming settings for your account
Password	>	
Two-factor authentication	>	
Time zone	>	Default recording preference Audio & video
System notifications	>	Automatically record
Account settings	>	LIVE STREAMING
Audio & video settings	>	Automatically live stream
Virtual backgrounds	>	Stream to 🕑 YouTube
Meeting mode	>	Follow the instructions on your YouTube Live Dashboard to setup live streaming on YouTube and enter the required
Waiting room	>	information below.
Hold music playlist	>	The share URL is the URL on YouTube for people to view the live stream. We will display this URL if your meeting room
Chimes & name announce	>	is full so that people can join the live stream easily. YouTube may change this URL after a streaming event has ended.
Primary dial-in numbers	>	Tou should check the foundate one before every streaming event and update this setting accordingly.
Moderator PIN	>	Stream name/key (required)
Access code	>	Share URL
Security	>	
Recording & live streaming	>	Stream to Deliv MEET ESLESTECH COM

*TIP*: For more detailed guidance on using your YouTube account generally, please visit the YouTube support site here: <u>support.google.com/youtube</u>

#### STEP 2: Share your livestream link with participants

- youtube.com/user/[channelname]/live
- Provide the link above with your 'channel name'
- We recommend adding it to your invitations and suggest it as an alternative option for 'overflow' if you are expecting you may exceed the maximum total of 100 participants.

Recording settings	×
Please review your settings below. Your meeting will start recording and streaming (if applicable) after you click [Start]. I want to record Audio only Audio & video	
<ul> <li>Also live stream this meeting to ESI Enterprise Meetings</li> <li>Transcribe this meeting and send me a smart summary</li> </ul>	
Cancel S	tart

#### STEP 3A: AUTO LIVE-STREAM

- Start an Online Meeting from your account dashboard
- Automatically live-stream: If you have enabled 'auto-start' within your YouTube account AND automatically live stream' in your conference account, once a second participant joins with their audio connected and the recording has begun, live streaming will automatically be initiated. You can verify this in your YouTube account.

#### STEP 3B: MANUAL LIVE-STREAM

- Click the 'Record' icon
- Select 'Audio & Video'
- Check the box to also live stream the meeting to ESI Enterprise Meetings (NOTE: This will only appear if you have already entered your YouTube credentials shown in step 1)
  - Click 'Start to begin recording'

Recording settings	×
Please review your settings below. Your meeting will start recording and streaming (if applicable) after you click [Start]. I want to record Audio only Audio & video	
<ul> <li>Also live stream this meeting to ESI Enterprise Meetings</li> <li>Transcribe this meeting and send me a smart summary</li> </ul>	
Cancel Sta	irt

• Navigate to your YouTube account and select Create > Go live



- Create a new livestream or open a scheduled livestream (ensure the streaming key is the same as entered previously in your conference account).
- Click on the 'GO LIVE' button. This will start a live stream on your YouTube Channel.

\*This feature is only available to a moderator

## How can I Manage my call Online?

To manage or moderate a meeting – whether or not you are taking part in the conference – just log in to your account from your computer, tablet or smartphone.

To access the Online Meeting Room simply log in to your account and click on 'START'



Then select your mic and webcam preferences and click 'Join Conference'.



To view the full participant list of who is on your call click '**Open participant list**' in the menu located at the bottom of the screen **\***. You can:

- Mute or unmute ALL conference participants
- Send an email invite with your conference details
- Mute and unmute individual participants
- Make someone a moderator
- See who has raised their hand
- Remove/block someone from the conference
- See if they are on 'view only'

• View who has left the conference already

	O	Gallery view	53
Participants			×
Mute all	Unm	nute all	<b>1</b> *
Q Search by participar	t name		
Gary (you)		🔶 🌒	:
		<b>X</b>	

In the menu at the bottom of the computer screen you will see the following list of options.

- Clicking on 'MUTE' will mute your own line, but you will still be able to hear others on the call. 🖳
- Click on 'VIDEO' to activate/deactivate your own webcam.
- 'SHARE' will activate screen sharing.
- 'WHITEBOARD' will open up the whiteboard.
- Click on the 'RECORD\*' button to initiate recording of your conference. You will have the option of recording audio or your whole online meeting which includes audio and video as well as screen sharing. You will see this option change so that you can stop the recording using the same button.
- If you wish to leave the Online Meeting Room and/or end the entire conference, click on 'End or leave meeting\*' X.

\*Only moderators can end a meeting or initiate recording.

In the participants list you have the option to mute/unmute, chat, pin a person's tile, make a person a moderator, send a person to the waiting room or disconnect a person.

**Note:** the max number of tiles is 25 in your online meeting room. The 25 tiles that display are the 24 most active speakers and the host.



For more options during your conference, you will see a row of icons near the bottom of the screen.

- OPEN CHAT opens the text chat where participants can ask questions and share files.
- OPEN PARTICIPANT LIST shows a list of participants in the meeting.
- CONFERENCE CONTROLS Located in the participants list, you can mute and unmute everyone.
- BREAKOUT ROOMS creates separate rooms for meeting participants.
- POLL starts a poll when a consensus is needed.
- **MORE** (three vertical dots) Check Meeting details, Settings, Change recording layout, Change background, Disable incoming video, Show live captions, check Connection quality



• FULL SCREEN Click this icon in the upper right corner of the screen to go into full screen mode .

## Video

## How do I start a video conference?

TIP: Use a headset where possible and do a test call in advance.

#### START NOW

- 1. Login to your account.
- 2. Click 'START' to initiate an on-demand conference to begin right away
- 4. Online Meeting Room. The first time you do this you will be prompted to "allow" your system to access your microphone and video.

The first caller in a video conference will hear hold music. Once at least one other participant arrives this music will stop and you will hear each other.

- 5. To activate and deactivate your webcam, click on 'VIDEO'
- 6. To share your screen, click on 'SHARE.

## How Do I Record My Video Conference?

Note: Only the moderator can record the meeting.

Make sure you have logged into your account before joining the conference.

- 1. The recording button is located within the Menu at the bottom of your **Online Meeting Room** .
- 2. Choose if you want to record **Audio only** or record **Audio & video**. By selecting audio and video your recording will include your video feed and screen sharing as well as the audio.



3. To start or pause a recording - simply click on 'Record'.

**Note**: All conference calls that are recorded can be automatically transcribed after each call so you have a detailed transcription of your meeting. This can be found in your past conferences tab along with your recordings. See the 'Features' section for more detailed information about 'CUE Smart Summary'.

START