NEXUS HUB | USER MANUAL (INTEGRATED USERS)

VERSION: 1.7.0 (OCTOBER RELEASE)

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SECTION 1: GENERAL INFORMATION

ABOUT NEXUS HUB

Welcome to the **Nexus Hub.** Our mission is helping companies grow.

Nexus enhances your virtual, on-site or hybrid engagement program so that you stand out against the competition and close bigger deals, faster.

Nexus facilitates communications and marketing across key enterprise divisions to create one point of contact for efficiency and reporting.

Nexus Hub is easily accessible from any web browser on your laptop and on your mobile device.

From enhancing customer engagements to making program management more efficient to accelerating and growing sales, Nexus is the solution to take customer engagements to new heights.

- Customer Engagement
- Virtual & Hybrid
- On-Site Experience
- Voice of the Customer
- Sales Acceleration
- Content Management
- Intelligence & Reporting

PROGRAM SITE AND USER LOGIN USER LOGIN (new functionality)

We replaced an old login form to the new functionality of Program Site. All content user is able to manage inside the Nexus Hub ***(please see section 8.4.).***

For instance, we have a completely new customer, and they did not setup a Program Site styles/setting. When customer opens a Nexus Hub they will see a login page.

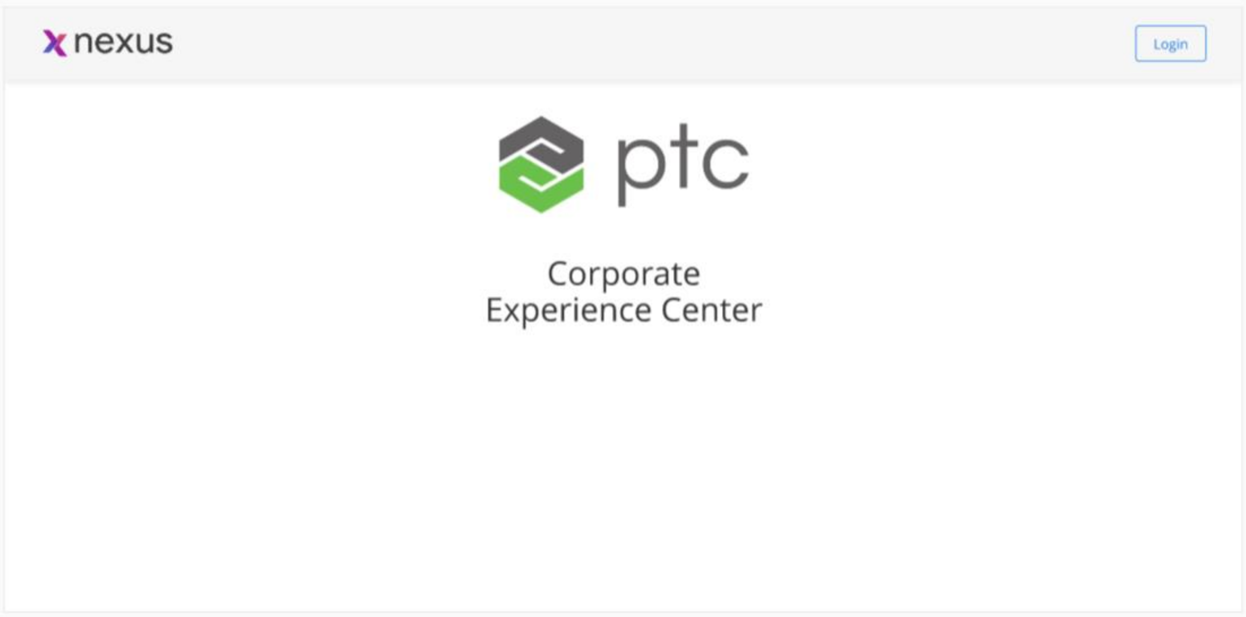


Figure 1. Nexus Hub login page

- Nexus logo in the header clickable and user will navigate to the Nexus official website
- Login button in the header navigates user to the Cognito login form
- The company logo can be uploaded inside Settings – Branding menu ***(please see section 3.4.).***
- Test under the logo (Corporate Experience Center) managed inside the Program Site – Program Settings – Program Name field

The same login page will be displayed when customer turned off the "Enable Program Site" toggle inside the Program Site – Program Settings

The next case when our customer turned on the "Enable Program Site" toggle and filled in all required information about their briefing program, solutions, and information about center(s).

When customer will open link to their Nexus Hub product, they will see the following pages.


ptc
THE STATE OF DIGITAL THREAD
Explore PTC's original research to discover how digital thread creates a closed loop between digital and physical worlds - optimizing products, people, processes, and places.
PTC welcomes hundreds of industrial companies each year to the CXC—to share cutting-edge technology and inspire with real use cases. Our executives and product experts demonstrate ways for guests to transform their own products and businesses.
Digital Solutions For Real-World Business Challenges
The world is seeing major global shifts to what it means to safely and productively conduct business. As a result, it's more important than ever to reduce operational costs, maximize revenue growth, and increase efficiency in streamlined and effective ways.
At PTC, we have more than 30 years of experience helping our customers solve key business challenges to achieve their goals with digital solutions in real-world applications. Find your path to faster success.
Improve Efficiency
Reduce Operational Costs
Maximize Revenue Growth
Choose From One Of Our Briefing Locations Near You To Get Started
Our technology helps industrial companies to create value for themselves, their customers, and the world. From hospital equipment with increased uptime and a spacesuit that is just as durable at half the weight, to more sustainable buildings and more efficient manufacturing—each improvement our technology helps to create, makes our world a better place.
Santa Clara, CA, USA
Houston, TX, USA
Tokyo, Japan
Sydney, Australia

Figure 2. Program Site

The section with Centers will contain only that center for which our customer enabled the "Enable Program Site" toggle inside the inside the Program Site – Center Settings.

Clicking on some Center they will navigate to the Center Page. This page contains more detailed information about Briefing Center.

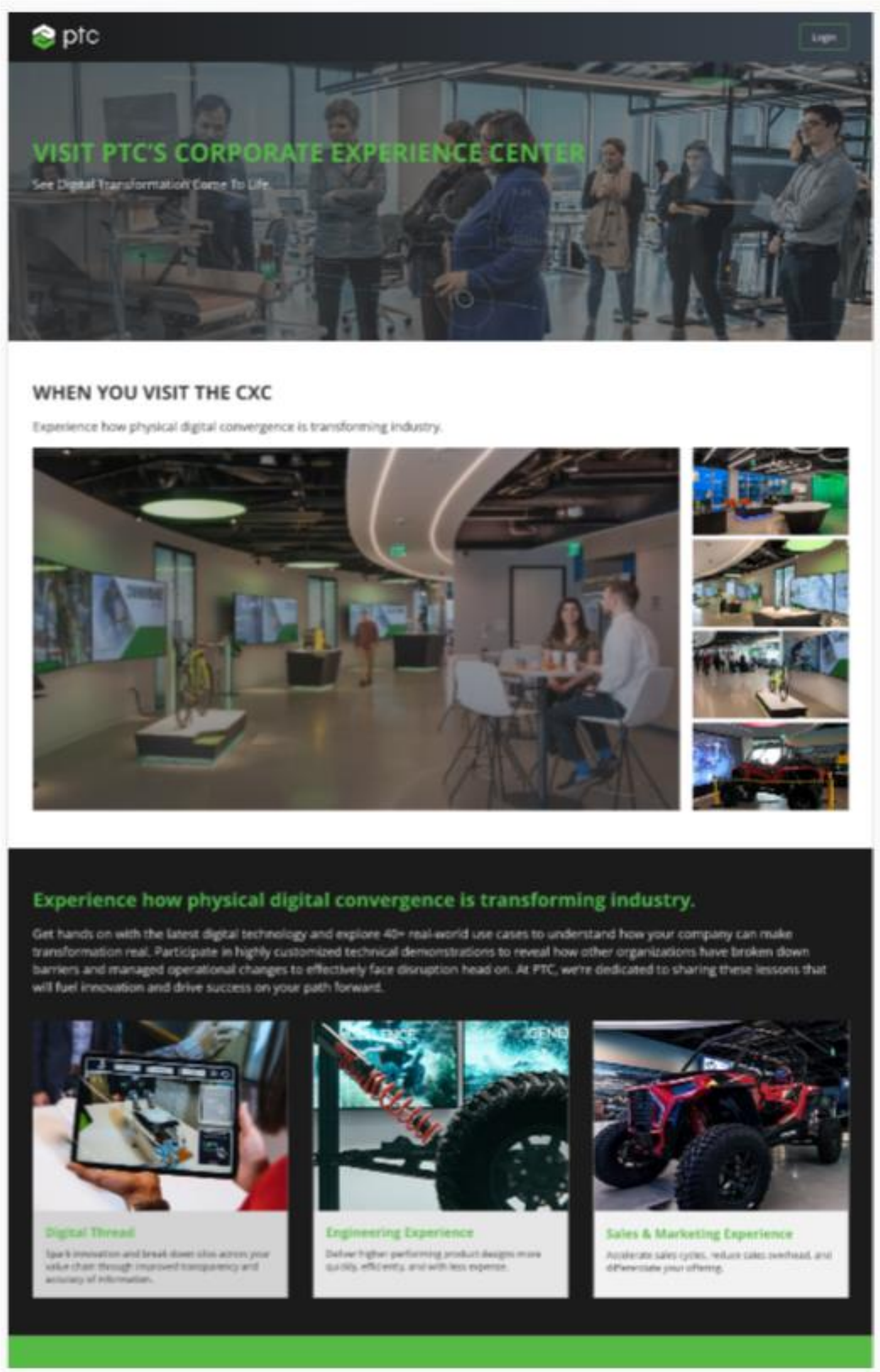


Figure 3. Center Page

From all page (Program Site, Center Site) user can login to the Nexus Hub by clicking the “Login” button.

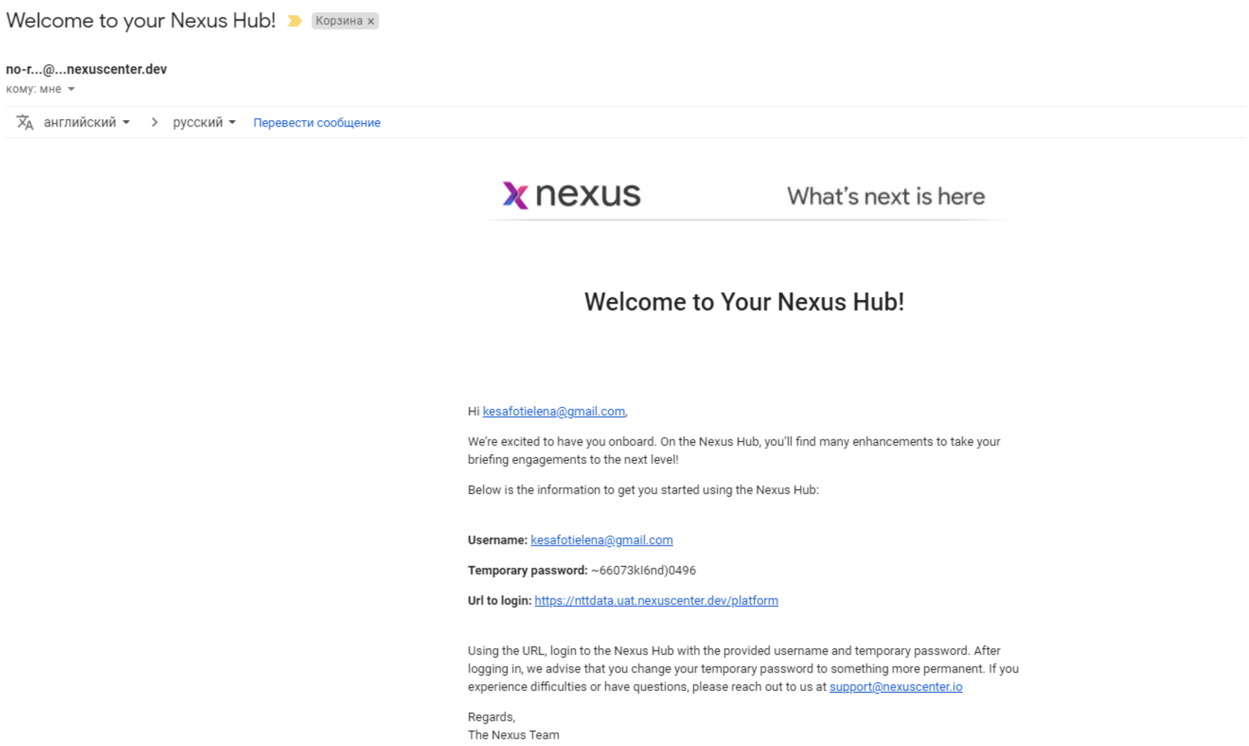
Logging in for the first time.

There are two possible variants to log in:

- Login with SSO (Single Sign-On) option
- Login using email and password

Login using email and password:

After Admin create your account you should receive email from the system with login, temporary password, and URL to the Nexus Hub.



Welcome to your Nexus Hub! Корзина ×

no-r...@...nexuscenter.dev
кому: мне

английский > русский Перевести сообщение

nexus What's next is here

Welcome to Your Nexus Hub!

Hi kesafotielena@gmail.com,

We're excited to have you onboard. On the Nexus Hub, you'll find many enhancements to take your briefing engagements to the next level!

Below is the information to get you started using the Nexus Hub:

Username: kesafotielena@gmail.com

Temporary password: ~66073kl6nd)0496

Url to login: https://nttdata.uat.nexuscenter.dev/platform

Using the URL, login to the Nexus Hub with the provided username and temporary password. After logging in, we advise that you change your temporary password to something more permanent. If you experience difficulties or have questions, please reach out to us at support@nexuscenter.io

Regards,
The Nexus Team

Figure 4. "New User Account" Email from

Clicking URL link user navigates to 'Sign In' form.

After first login with a temporary password user needs to change it to permanent

Login using email and password:

Clicking '<Tenant>SSO' user will log in with SSO option.

Forgot your password?

To reset your password, click the "Forgot your password?" link from the login page. Enter your username and click "Reset my password". Check your email for a time sensitive link that you will use to choose a new password.

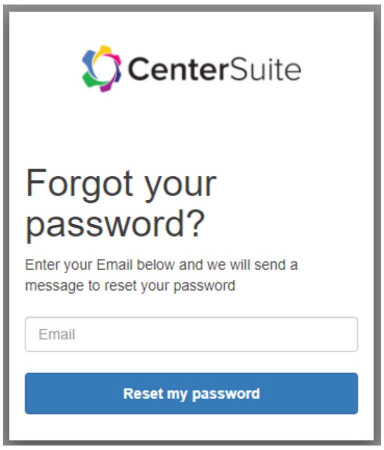


Figure 5. 'Forgot your password' form

User will receive email with text body *"We've received your request that you would like to reset your password. Please use the code below to reset your password:"* and code to restore password.

User should fill 'Change Password' form with code from email.

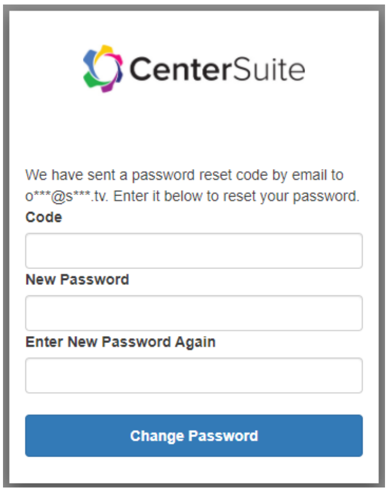


Figure 6. Change Password form

SECTION 2: USER MANAGEMENT AND PERMISSIONS

NOTES:

Tenants already created in the system have only entities - first/last name, email, and phone number. To map these tenants with new Role Model, we will provide them the following permission:

- Center Access - All Centers
- Default Center - the first briefing center from the list
- System Role - Admin
- Company - Tenant name

Starting with the current release we divide our users by roles based on the User Management and Permissions functionality.

Now we split our users into two separate roles – Admin and Manager (Briefing Manager).

Below you can see table with main functionalities available for different roles.

Table 1. User Management and Permissions

Functionality	Admin		Manager	
	Program Staff	Support & Logistics	Program Staff	Support & Logistics
Settings – Programs				
Manage entities inside Settings menu (Centers/Rooms/Industries/Engagement Types/Topic Categories/ Evaluation Questions/Emails)	✓	✓	✓	✓
Settings – Users:				
Create a new user	✓	✓	✕	✕
User – Profile:				
See their own profile	✓	✓	✓	✓
Home page:				
Manage briefings on the Home page:	✓	✓	✓	✓

- see list with Active and Upcoming briefings				
Create a new briefing as a Briefing Manager	✓	✓ *Only for briefings with Engagement Type = Test*	✓	✓ *Only for briefings with Engagement Type = Test*
Engagement – Calendar:				
Calendar View	✓	✓	✓	✓
Engagement – Briefings:				
Create a new briefing as a Briefing Manager	✓	✓ *Only for briefings with Engagement Type = Test*	✓	✓ *Only for briefings with Engagement Type = Test*
Manage briefings on the Briefings page: - see list with Active/Completed/Postponed briefings - create/edit/delete/postpone briefings - create/edit/delete Agenda - create/edit/delete Attendees - manage Facilitation tab - manage Experience tab	✓	✓	✓	✓

- receive numbers of feedback on the Evaluation tab - Send emails - Launch Virtual Welcome screen - Launch CE App Client				
Send emails: - "Meeting Invite" - "Ce App Access Link"	✓	✓ ***Only for briefings with Engagement Type = Test***	✓	✓ ***Only for briefings with Engagement Type = Test***
Engagement – Accounts:				
Manage Accounts: - create/edit Accounts - export Accounts	✓	✓	✓	✓
- delete Accounts	✓	✓	✗	✗
Engagement – Speakers:				
Manage Speakers: - create/edit/delete Speaker - assign Speaker to a Topic - export list of Speakers	✓	✓	✓	✓
Engagement – Topics:				
Manage Topics: - create/edit/delete Topic - assign Topic to a Speaker - export Topics	✓	✓	✓	✓
Engagement – Requests:				

Manage Externa/Internal requests: - edit Interna/External requests on the Pending page - create Internal requests - delete requests - convert requests into the briefing	✓	✓	✓	✓
Experience – Customer Portal:				
Manage CE App Client: - edit Center Info and Leadership Team Info - create/edit/delete Media - create/edit/delete Leadership Team Members - create/edit/delete Concierge Categories - create/edit/delete Places for each Concierge Category - manage Styles - create/edit/delete Messages - manage Settings/Configuration	✓	✓	✓	✓
Experience – Virtual Warmer:				
Manage Virtual Welcome screens: - create/edit/delete Quick Use forms - manage Settings - create/edit/delete Background media files	✓	✓	✓	✓
Experience – On-Site Channel – Welcome Screen:				
- manage product styles/settings	✓	✓	✓	✓

Experience – On-Site Channel – Room Warmer:				
- manage product styles/settings	✓	✓	✓	✓
Insight – Analytics:				
See Analytics *(new feature)*: - see analytics for different CE App modules (App Usage/Sections Views/Media Metrics) - export reports	✓	✓	✓	✓
Insight – Reports:				
- View the charts - filter - export	✓	✓	✓	✓

SECTION 3: SETTINGS

3.1. USERS

Admin user can navigate to that page from the Settings menu and then selects the 'Users' option.

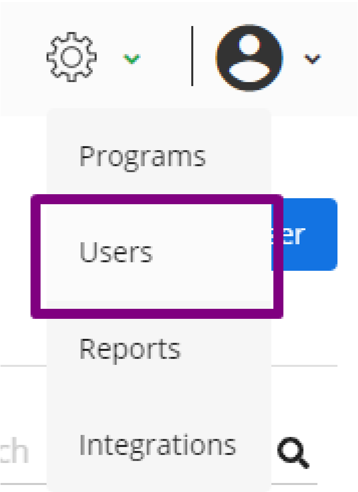


Figure 7. Drop-down with options inside 'Settings' menu

On the 'Users' page Admin sees the already created users either Admin or Manager.

CREATE A NEW USER

The other important possibility for Admin user is **to create a new user** by clicking on 'Add User' button.

On the 'User Details' form Admin should fill in the following information:

Table 2. User Details form

Field	Data
Email	1. Required 2. Text field 3. Max length: 100 4. Error message: User Email name is required
First Name	1. Required 2. Text field 3. Max length: 100 4. Error message: User First Name is required
Last Name	1. Required 2. Text field

	3. Max length: 100 4. Error message: User Last Name is required
Headshot	1. Optional 2. Image upload button 3. Supported files: png, jpeg, jpg 4. Max file size: 50 MB
Company	1. Required 2. Text field 3. Max length: 100 4. Error message: Company is required
Title	1. Optional 2. Text field 3. Max length: 100
System Role	1. Required 2. Dropdown with roles - Admin, Manager 3. Error message: System Role is required
Program Role	1. Required 2. Dropdown with roles – Program Staff, Support & Logistics 3. Error message: Program Role is required
Center Access	1. Required 2. Dropdown with the list of available Centers 3. Multiple selection 4. 'ALL' option available only for user with the System Role - Admin 5. Error message: Center Access is required
Default Center	1. Required 2. Dropdown with the list of Centers previously selected on the 'Center Access' field. 3. Error message: Default Center is required

EDIT/DELETE USER

Admin can edit other user's details by clicking on a name of that user on the list.

On the 'User Details' page all information related to the selected user displays in read-only mode.

At the bottom of the screen Admin can track the information who created and modified the selected profile:

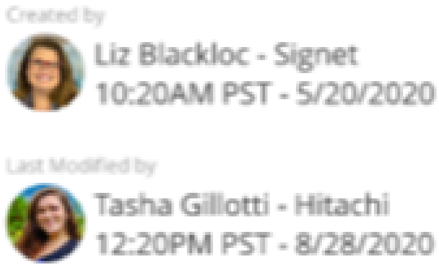


Figure 8. Created By/Last Modified By section

If Admin wants to change some information they should click on the 'Edit' text button located under the title.

On the other user's details page, all information **except** the 'Email' field is available for editing.

Admin can delete other user from the system by clicking on the 'Delete' text button.

Currently logged into the CS Platform Admin can view they own profile on the Users list. The main difference that user **cannot change they System Role** and **delete their own profile** from the system.

NOTES:

1. In cases when Admin changed user's System Role/Center Access/Default Center the current session should expire. The next action that this user tries to take forward they to the login page.

2. If a user's account is deleted, the next action that deleted user tries to take in the portal should stop.

3.2. PROGRAMS

At the "Settings -> Programs" Admin user can manage the following options:

- Centers
- Rooms
- Industries
- Engagement Types
- Topic Categories
- Evaluations
- Emails

3.2.1. CENTERS

On that page Admin can only view the list with already created Centers. Also, we allow user edit Center information.

NOTES:

If you need to create a new Briefing Center, please contact your host for assistance

User can edit center details by clicking Center name on the list. After that user navigates to 'Center Details' page on edit mode.

Field	Data
Center Name	1. Required 2. Text field 3. Max length: 80 symbols 4. Error message: Center name is required
Time Format	1. Required 2. Drop-down with 12 and 24h options 3. The 12h format specified by default 4. Error message: Time Format is required ***NOTES:*** *In the June release we simply added that drop-down inside the Center Details form.* *In the August release the time format will apply to the corresponding products – Customer Postal, Virtual Warmer, Signet Player*

Time Zone	1. Required 2. Read-only
Country	1. Required 2. Dropdown 3. Error message: Country is required
Address Line 1	1. Required 2. Text field 3. Max length: 50 symbols 4. Error message: Address line 1 is required
Address Line 2	1. Optional 2. Text field 3. Max length: 35 symbols
City	1. Required 2. Text field 3. Max length: 58 symbols 4. Error message: City is required
State	1. Required 2. Dropdown 3. Error message: State is required
Zip/Postal Code	1. Required 2. Text field 3. Only numbers 4. Max length: 10 symbols 5. Error message: Zip Code is required
Phone Number	1. Optional 2. Only numbers 3. Max length: 20 symbols

3.2.2. ROOMS

On that page, user can see the list with previously created rooms into an external briefing management system.

All information on that page is displayed in the read-only mode.

3.2.3. INDUSTRIES

On that page, user can see the list with previously created industries into an external briefing management system.

All information on that page is displayed in the read-only mode.

3.2.4. EVALUATIONS

On that page, user can see the list with created evaluation questions into an external briefing management system. These questions use in CE Client App for surveys after briefing.

All information on that page is displayed in the read-only mode and in the same time user can filtering questions by Attendee Type and Question Levels (Briefing Engagement or Agenda Speaker).

3.2.5. ENGAGEMENT TYPES

On that page, user can see the list with Briefing Types already created into an external briefing management system.

All information on that page is displayed in the read-only mode

3.2.6. TOPIC CATEGORIES

Topic Category is new option inside Settings – Programs menu.

On that page, user can see the list with Topic Categories already created into an external briefing management system

3.2.7. EMAILS

NOTES:

If the user wants to change a system variable, then the system cannot insert the correct value inside that field.

CE APP ACCESS LINK EMAIL

Variables	Data
{{tenant.name}}	Tenant Name will be indicated in the email subject. *e.g. Hitachi invites you*
{{attendee.firstName}}	Attendee First Name who was selected to send the email *e.g. Dear Liz*
{{direct_access_link}}	Personal access link to CE Client App. User can create a different name for that link *e.g. Here is your Signet Customer Engagement Portal*
{{center.name}}	Center Name where briefing will take place

SEND CALENDAR INVITE IN-PERSON

There are some rules of send Meeting/Calendar invite:

1. User can send the Meeting Invite only for active briefings
2. For multi-day briefing system will send the meeting invite for each briefing day separately:
- If a briefing for the current day is not finished yet -> user can send a meeting invite for today
- if the briefing.EndTime for the current day has expired-> send a meeting invite for the next day
3. If Briefing Manager has changed some information (created/edited/deleted agenda item, change the briefing duration etc.) they should re-send meeting invite with the updated information.

Variables	Data
{{center.title}}	Center Name where briefing will take place will be indicated in the email subject *e.g. Hitachi Executive Center - Briefing Invite*

{{briefing.title}}	Briefing Name
{{briefing.scheduledStartAt}}	Briefing Date & Time
{{briefing.briefingManager}}	Briefing Manager who indicated in the briefing
{{briefing.agenda}}	Agenda list for the current briefing day
{{center.addressLine1}}	Google Maps link with Briefing Center location https://maps.google.com/?q={{center.addressLine1}}+{{center.city}} **Information from Center Details:** {{center.addressLine1}} {{center.city}}

SEND CALENDAR INVITE VIRTUAL

There are some rules of send Meeting/Calendar invite:

1. User can send the Meeting Invite only for active briefings
2. For multi-day briefing system will send the meeting invite for each briefing day separately:

- If a briefing for the current day is not finished yet -> user can send a meeting invite for today
- if the briefing.EndTime for the current day has expired-> send a meeting invite for the next day

3. If Briefing Manager has changed some information (created/edited/deleted agenda item, change the briefing duration etc.) they should re-send meeting invite with the updated information.

Variables	Data
{{center.title}}	Center Name where briefing will take place will be indicated in the email subject *e.g. Hitachi Executive Center - Briefing Invite*
{{briefing.title}}	Briefing Name

{{briefing.scheduledStartAt}}	Briefing Date & Time
{{briefing.briefingManager}}	Briefing Manager who indicated in the briefing
{{briefing.agenda}}	Agenda list for the current briefing day
{{briefing.videoConferenceLink}}	Meeting URL. If Meeting URL did not indicate user will see N/A in front of that field on the received email
{{briefing.videoConferenceMeetingId}}	Meeting ID If Meeting ID did not indicate user will see N/A in front of that field on the received email
{{briefing.videoConferencePassword}}	Meeting Password If Meeting Password did not indicate user will see N/A in front of that field on the received email
{{briefing.videoConferencePhoneNumber}}	Meeting Phone Number If Meeting Phone Number did not indicate user will see N/A in front of that field on the received email

SEND WEEKLY DEBRIEF

This email will go out to users on **every Friday at 9am** based on the user's default center location.

User will see dynamic messages where sections do not show any briefings.

{{user.defaultCenter.title}}	The name of user's default center. That information will be indicated in the email subject

	e.g. Weekly Debrief Email - Hitachi Executive Center - Briefing Invite
{{greeting}}	The predefined list of dynamic messages. Every week a new message shall be displayed. *e.g. What a week! Here's your debrief. Keep up the good work.*
{{currentWeek}}	This Week's Recap shall only include briefings with "Past" and "Active" statuses that took place during this week and last weekend.
{{nextWeek}}	Next Week's Briefings shall only include briefings with "Active" status that will take place during next week include weekend.
{{newRequests}}	New Future Briefings Added (New Requests) shall only include briefings that were created during this week and last weekend.

UPCOMING 3 MONTH BRIEFINGS EMAIL

This email will go out to users on **every Friday at 9am** based on the user's default center location.

User will see dynamic messages where sections do not show any briefings.

{{user.defaultCenter.title}}	The name of user's default center. That information will be indicated in the email subject *e.g. Upcoming 3 Month Briefings Email - Hitachi Executive Center - Briefing Invite*
{{greeting}}	The receiver name and general text message *e.g. Hi Olena,*

	Here are the briefings in the next 3 months for Signet Internal Center
{{upcoming3MonthEmail}}	List with briefings scheduled for the upcoming 3 months

DIRECT ACCESS EXTERNAL

Variables	Data
{{tenant.title}}	Tenant Name – e.g. Hitachi
{{user.name}}	Attendee who logged in CE Client App and send that email
{{evaluationLink}}	Customer Engagement Application

DIRECT ACCESS INTERNAL

Variables	Data
{{tenant.title}}	Tenant Name – e.g. Hitachi
{{user.name}}	Attendee who logged in CE Client App and send that email
{{evaluationLink}}	Customer Engagement Application

SEND CENTER BROCHURE

{{tenant.title}}	Tenant Name – e.g. Hitachi
{{user.name}}	Attendee who logged in CE Client App and send brochure to they email address
{{brochure.link}}	{{tenant.title}} Center Brochure

SEND CENTER CONCIERGE DETAILS

{{tenant.title}}	Tenant Name – e.g. Hitachi
{{user.name}}	Attendee who logged in CE Client App and send information about Place to they email address
{{place.title}}	Place Title from the CE Client App – Concierge tab
{{place.description}}	Place Description from the CE Client App – Concierge tab
{{place.webSite}}	Place website information from the CE Client App – Concierge tab
{{place.address}}	Place Address from the CE Client App – Concierge tab
{{place.phone}}	Place Phone from the CE Client App – Concierge tab
{{place.overview}}	Place Overview information

SEND MEDIA

{{tenant.title}}	Tenant Name
{{user.name}}	Attendee who logged in CE Client App and send media file(s) to they email address
{{links}}	Link (s) to media file(s) sent in email

SEND MESSAGE TO BRIEFING MANAGER

{{briefingManager.name}}	Briefing Manager first name/last name specified in Briefings
{{tenant.title}}	Tenant Name

{{content}}	Message text
{{attendee.name}}	Attendee Name who sent that email
{{attendee.email}}	Attendee email address

SEND MESSAGE TO SPEAKER

{{tenant.title}}	Tenant Name
{{speaker.name}}	Speaker First Name/Last Name whom user sent an email
{{content}}	Message text
{{attendee.name}}	Attendee Name who sent that email
{{attendee.email}}	Attendee email address
{{briefing.name}}	Briefing Name

SEND TO BRIEFING MANAGER ATTENDEE CHANGED EMAIL

{{briefing.name}}	Briefing Name
{{attendee.name}}	Attendee Name who sent that email
{{attendee.oldEmail}}	Attendee old email
{{attendee.email}}	Attendee new email:
{{revokeLink}}	Revoke link
{{tenant.title}}	Tenant Name

SEND TO BRIEFING MANAGER NEW ATTENDEE

{{briefing.name}}	Briefing Name
{{attendee.name}}	Attendee Name who sent that email

{{attendee.email}}	Attendee email address
{{revokeLink}}	Revoke link
{{tenant.title}}	Tenant Name

3.2.8. EMAIL SETTINGS (new functionality)

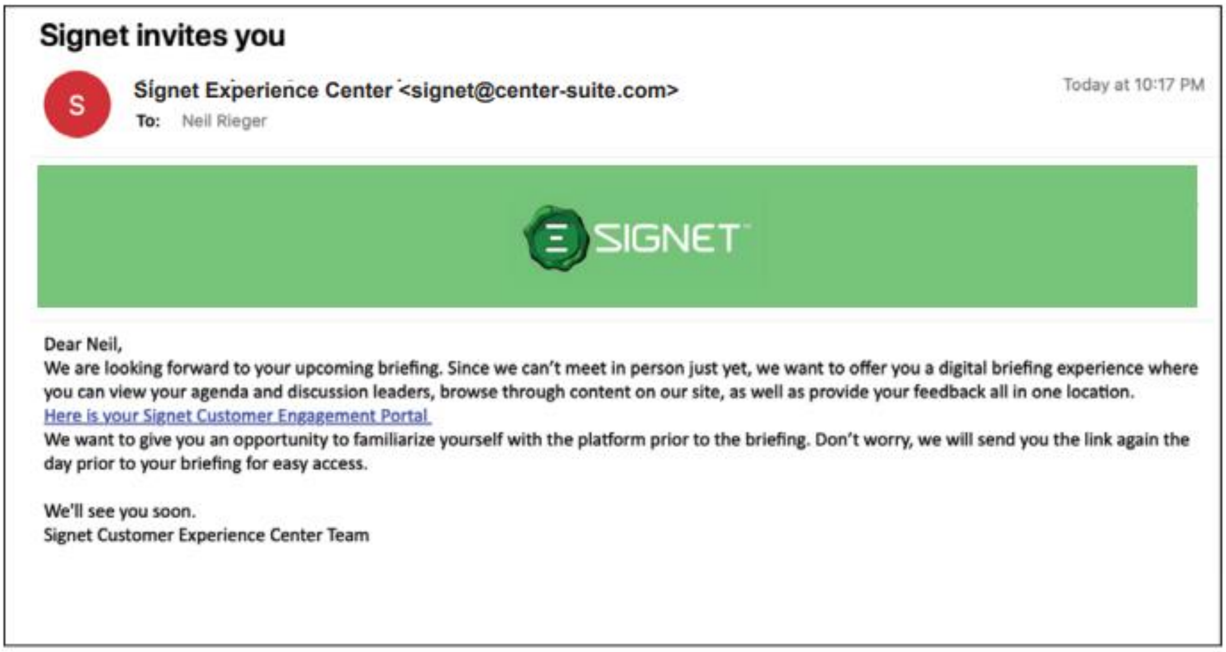
On the Email Settings page user can specify the email alias name and/or upload the email header graphic. The provided settings will be apply for tenant in general.

1. Email Alias Name:

- max length - 35 characters
- The default for Email Alias Name is the tenant name. (i.e. Hitachi - so the email will be sent out as “Hitachi)
- The user can change the Email Alias Name (i.e. Hitachi Insight Center - so the email will be sent out as “Hitachi Insight Center”)

2. Email Header Graphic:

- user can upload media file which will be displayed as a banner inside emails
- Email clients: Outlook/Gmail
- List of emails: All
- File format: JPG, PNG
- File max size: 10 Mb
- Fit image into proposed container (*800px wide and 100px tall)*



Signet invites you

Signet Experience Center <signet@center-suite.com>

To: Neil Rieger

Today at 10:17 PM

SIGNET

Dear Neil,

We are looking forward to your upcoming briefing. Since we can't meet in person just yet, we want to offer you a digital briefing experience where you can view your agenda and discussion leaders, browse through content on our site, as well as provide your feedback all in one location.

Here is your Signet Customer Engagement Portal

We want to give you an opportunity to familiarize yourself with the platform prior to the briefing. Don't worry, we will send you the link again the day prior to your briefing for easy access.

We'll see you soon.

Signet Customer Experience Center Team

Figure 9. Email with uploaded header graphic

3.3. PRINTABLES

There is a new menu inside the Setting where user can manage the options how the printed Agenda Sheets and Attendees Tent Cards will look like.

AGENDA SHEETS

User is be able to see a menu where they can manage how the printed Agenda Sheets will look like.

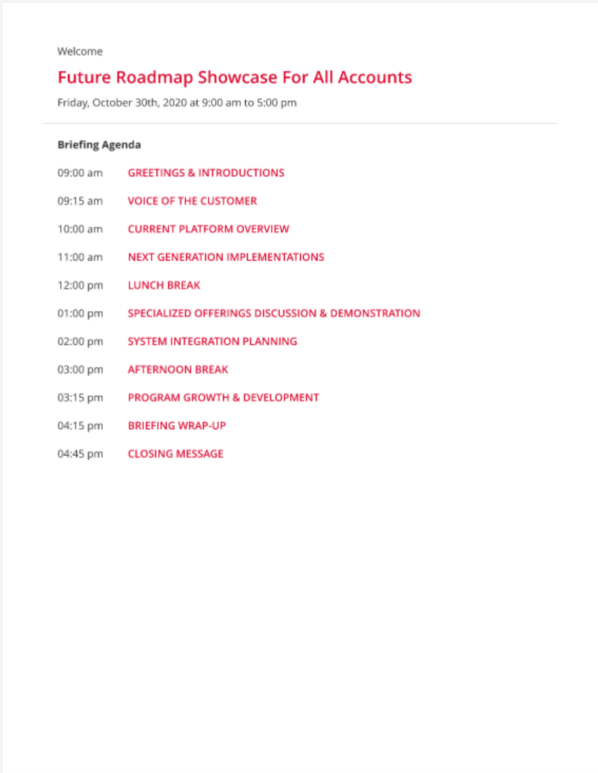
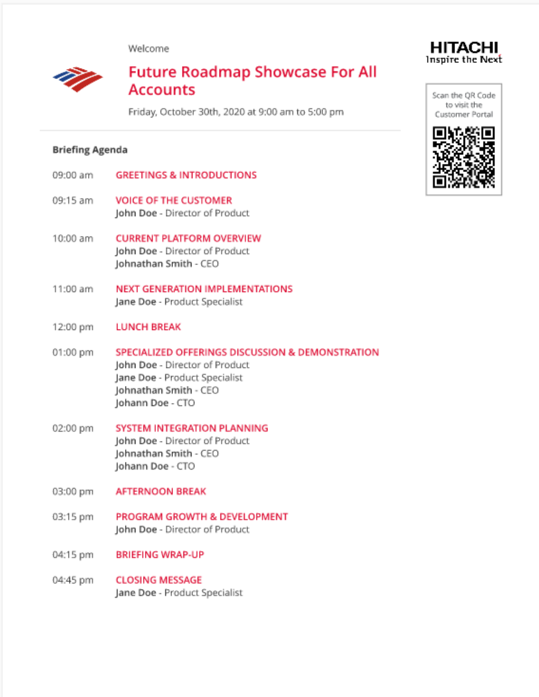
Field	Value	Validation
Briefing Name Text Color	- required - test field - max length: 7 symbols - HEX code 333333 set by default	Error: Briefing Name Text Color is required
Agenda Topic Text Color	- required - test field - max length: 7 symbols - HEX code 333333 set by default	Error: Agenda Topic Text Color is required
Show Host Logo	- **toggle is disabled till we'll implement the Branding page (October release)**	
Show Customer Portal General Access QR Code	- toggle is set to ON/YES by default	
Show Client Logo with Welcome	- toggle is set to ON/YES by default	
Show Salutation Message	- toggle is set to ON/YES by default	
Show Agenda Topic Name in All-Caps	- toggle is set to ON/YES by default	
Show Agenda Descriptions	- toggle is set to ON/YES by default	

Show Speakers	- toggle is set to ON/YES by default	
Show Speaker Title	- toggle is set to ON/YES by default	

PREVIEW AGENDA SHEETS WITH THE TEST DATA

User can see a preview of the agenda sheets depending on the settings to know how it looks like when I will print the real one.

Agenda Sheet View	Screenshot	XD link
Agenda print layout with client logo	 Welcome Future Roadmap Showcase For All Accounts Thursday, June 17th, 2021 at 9:00 am to 5:00 pm Briefing Agenda 09:00 am GREETINGS & INTRODUCTIONS 09:15 am VOICE OF THE CUSTOMER John Doe - Director of Product 10:00 am CURRENT PLATFORM OVERVIEW John Doe - Director of Product Johnathan Smith - CEO 11:00 am NEXT GENERATION IMPLEMENTATIONS Jane Doe - Product Specialist 12:00 pm LUNCH BREAK 01:00 pm SPECIALIZED OFFERINGS DISCUSSION & DEMONSTRATION John Doe - Director of Product Jane Doe - Product Specialist Johnathan Smith - CEO Johann Doe - CTO 02:00 pm SYSTEM INTEGRATION PLANNING John Doe - Director of Product Johnathan Smith - CEO Johann Doe - CTO 03:00 pm AFTERNOON BREAK 03:15 pm PROGRAM GROWTH & DEVELOPMENT John Doe - Director of Product 04:15 pm BRIEFING WRAP-UP 04:45 pm CLOSING MESSAGE Jane Doe - Product Specialist	Agenda print layout with client logo

Agenda Print layout without Logo	 Welcome Future Roadmap Showcase For All Accounts Friday, October 30th, 2020 at 9:00 am to 5:00 pm Briefing Agenda 09:00 am GREETINGS & INTRODUCTIONS 09:15 am VOICE OF THE CUSTOMER 10:00 am CURRENT PLATFORM OVERVIEW 11:00 am NEXT GENERATION IMPLEMENTATIONS 12:00 pm LUNCH BREAK 01:00 pm SPECIALIZED OFFERINGS DISCUSSION & DEMONSTRATION 02:00 pm SYSTEM INTEGRATION PLANNING 03:00 pm AFTERNOON BREAK 03:15 pm PROGRAM GROWTH & DEVELOPMENT 04:15 pm BRIEFING WRAP-UP 04:45 pm CLOSING MESSAGE	[Agenda Print layout without Logo]()
Agenda print layout with client logo and QR code	 Welcome Future Roadmap Showcase For All Accounts Friday, October 30th, 2020 at 9:00 am to 5:00 pm HITACHI Inspire the Next Scan the QR Code to visit the Customer Portal Briefing Agenda 09:00 am GREETINGS & INTRODUCTIONS 09:15 am VOICE OF THE CUSTOMER John Doe - Director of Product 10:00 am CURRENT PLATFORM OVERVIEW John Doe - Director of Product Johnathan Smith - CEO 11:00 am NEXT GENERATION IMPLEMENTATIONS Jane Doe - Product Specialist 12:00 pm LUNCH BREAK 01:00 pm SPECIALIZED OFFERINGS DISCUSSION & DEMONSTRATION John Doe - Director of Product Jane Doe - Product Specialist Johnathan Smith - CEO Johann Doe - CTO 02:00 pm SYSTEM INTEGRATION PLANNING John Doe - Director of Product Johnathan Smith - CEO Johann Doe - CTO 03:00 pm AFTERNOON BREAK 03:15 pm PROGRAM GROWTH & DEVELOPMENT John Doe - Director of Product 04:15 pm BRIEFING WRAP-UP 04:45 pm CLOSING MESSAGE Jane Doe - Product Specialist	[Agenda print layout with client logo and QR code]()

Agenda Print layout with Logo and Description

Agenda Print layout with Logo and Description

<table>
<tr>
<td>Agenda print layout with client logo and QR code 2-day</td>
<td>


Welcome

Future Roadmap Showcase For All Accounts

Thursday, June 17th, 2021 at 9:00 am to 5:00 pm and Friday, June 18th at 10:00 am to 2:30 pm

HITACHI Inspire the Next

Briefing Agenda for Thursday, June 17th, 2021 at 9:00 am to 5:00 pm

09:00 am GREETINGS & INTRODUCTIONS

09:15 am VOICE OF THE CUSTOMER

John Doe - Director of Product

10:00 am CURRENT PLATFORM OVERVIEW

John Doe - Director of Product

Johnathan Smith - CEO

11:00 am NEXT GENERATION IMPLEMENTATIONS

Jane Doe - Product Specialist

12:00 pm LUNCH BREAK

01:00 pm SPECIALIZED OFFERINGS DISCUSSION & DEMONSTRATION

John Doe - Director of Product

Jane Doe - Product Specialist

Johnathan Smith - CEO

Johann Doe - CTO

02:00 pm SYSTEM INTEGRATION PLANNING

John Doe - Director of Product

Johnathan Smith - CEO

Johann Doe - CTO

03:00 pm AFTERNOON BREAK

03:15 pm PROGRAM GROWTH & DEVELOPMENT

John Doe - Director of Product

04:15 pm BRIEFING WRAP-UP

04:45 pm CLOSING MESSAGE

Jane Doe - Product Specialist

Welcome

Future Roadmap Showcase For All Accounts

Thursday, June 17th, 2021 at 9:00 am to 5:00 pm and Friday, June 18th at 10:00 am to 2:30 pm

HITACHI Inspire the Next

Briefing Agenda for Friday, June 18th, 2021 at 10:00 am to 2:30 pm

10:00 am VOICE OF THE CUSTOMER

John Doe - Director of Product

10:30 am PREVIOUS DAY RE-CAP

Johnathan Smith - CEO

11:00 am NEXT GENERATION IMPLEMENTATIONS

Jane Doe - Product Specialist

12:00 pm LUNCH BREAK

01:00 pm SPECIALIZED OFFERINGS DEMONSTRATION

John Doe - Director of Product

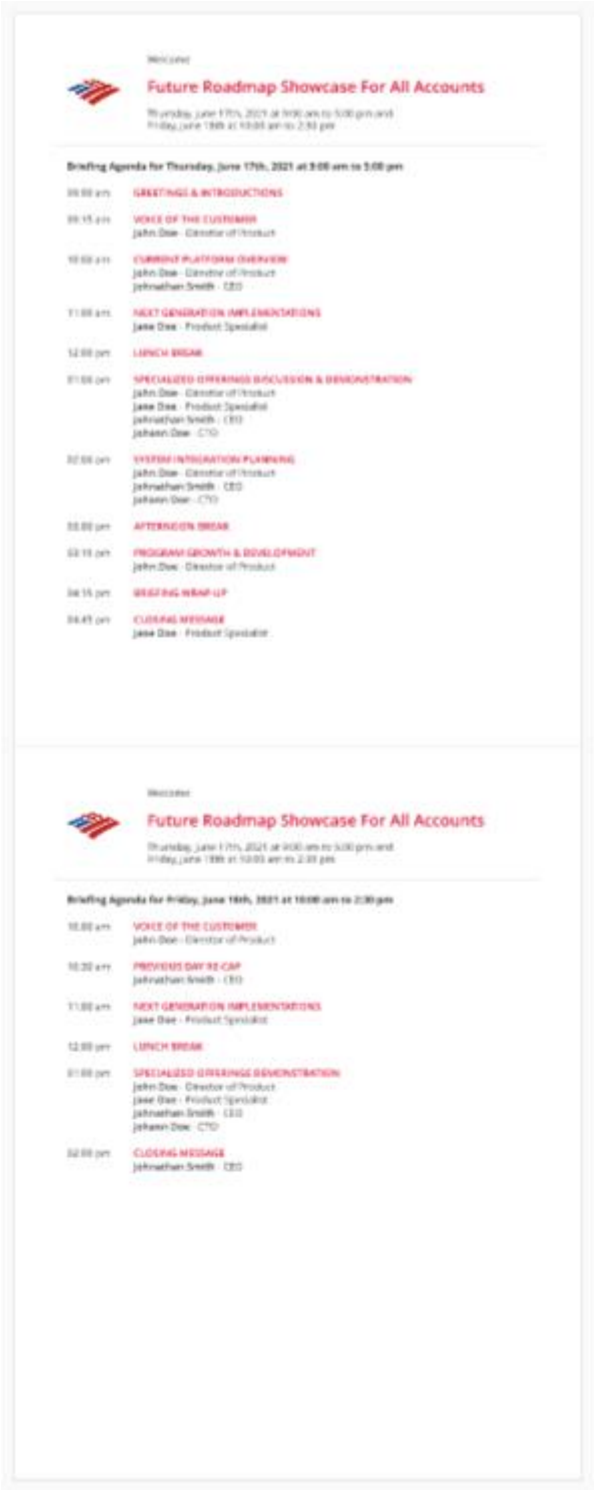
Jane Doe - Product Specialist

Johnathan Smith - CEO

Johann Doe - CTO

02:00 pm CLOSING MESSAGE

Johnathan Smith - CEO
</td>
<td>Agenda Print layout with Client Logo and QR code 2-day</td>
</tr>
</table>

Agenda Print layout with Logo 2-day		[Agenda Print layout with Logo 2-day]()

Briefing description text is the “During (Day-of) briefing salutation” from the Customer Portal - Messaging menu:

- If we have more than one salutation message - show the first one on the list
- If we haven’t the salutation message - leave that section empty

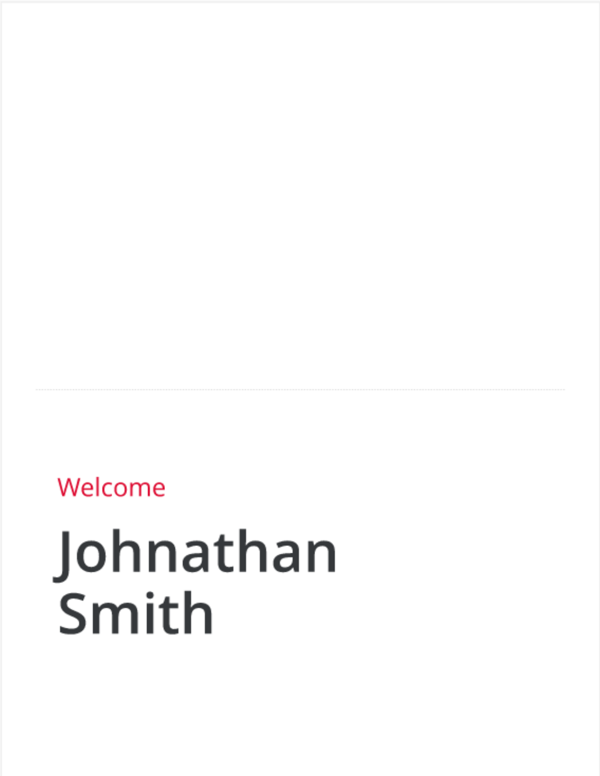
ATTENDEE TEND CARDS

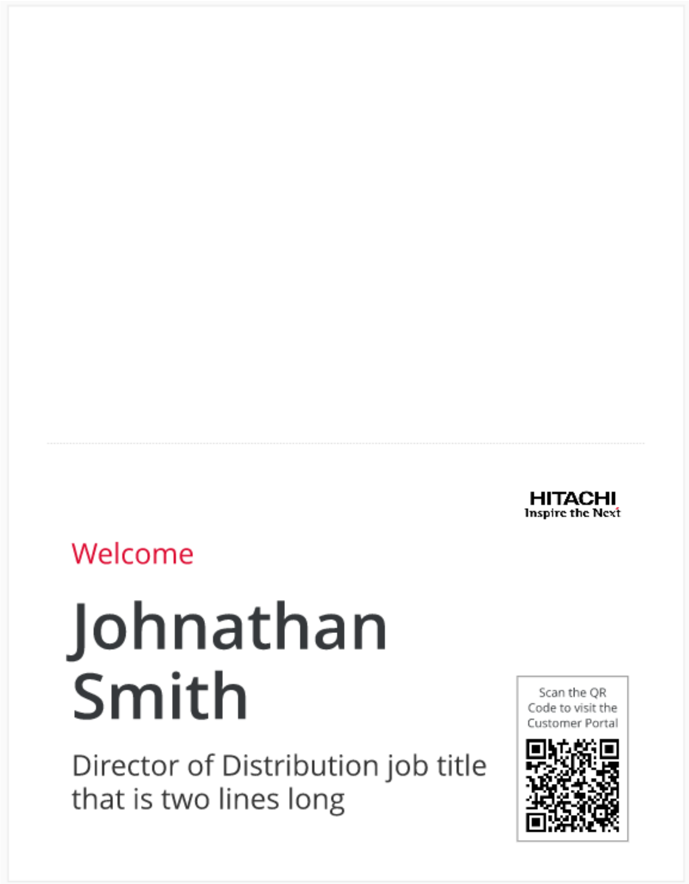
User is be able to see a menu where they can manage how the printed Attendee Tent Cards will look like.

Field	Value	Validation
Welcome Text Color	- required - test field - max length: 7 symbols - HEX code 333333 set by default	Error: Welcome Text Color is required
Show Host Logo	- **toggle is disabled till we'll implement the Branding page (October release)**	
Show Customer Portal General Access QR Code	- toggle is set to ON/YES by default	
Show Attendee Job Title	- toggle is set to ON/YES by default	

PREVIEW ATTENDEE TENT CARDS WITH THE TEST DATA

User can see a preview of the agenda sheets depending on the settings to know how it looks like when I will print the real one.

Attendee Tent Card View	Screenshot	XD link
Seat Tent without job title		[Seat Tent without job title]()

Seat Tent with QR code		[Seat Tent with QR code]

3.4. BRANDING (new functionality)

There is a separate menu when user can upload one file (company logo). This file will be used for the following functionality:

- Program Site/Center Site logo in the header
- Company logo on the Login page (if the Program Site disabled)
- Host logo for printables
- Host logo for reports

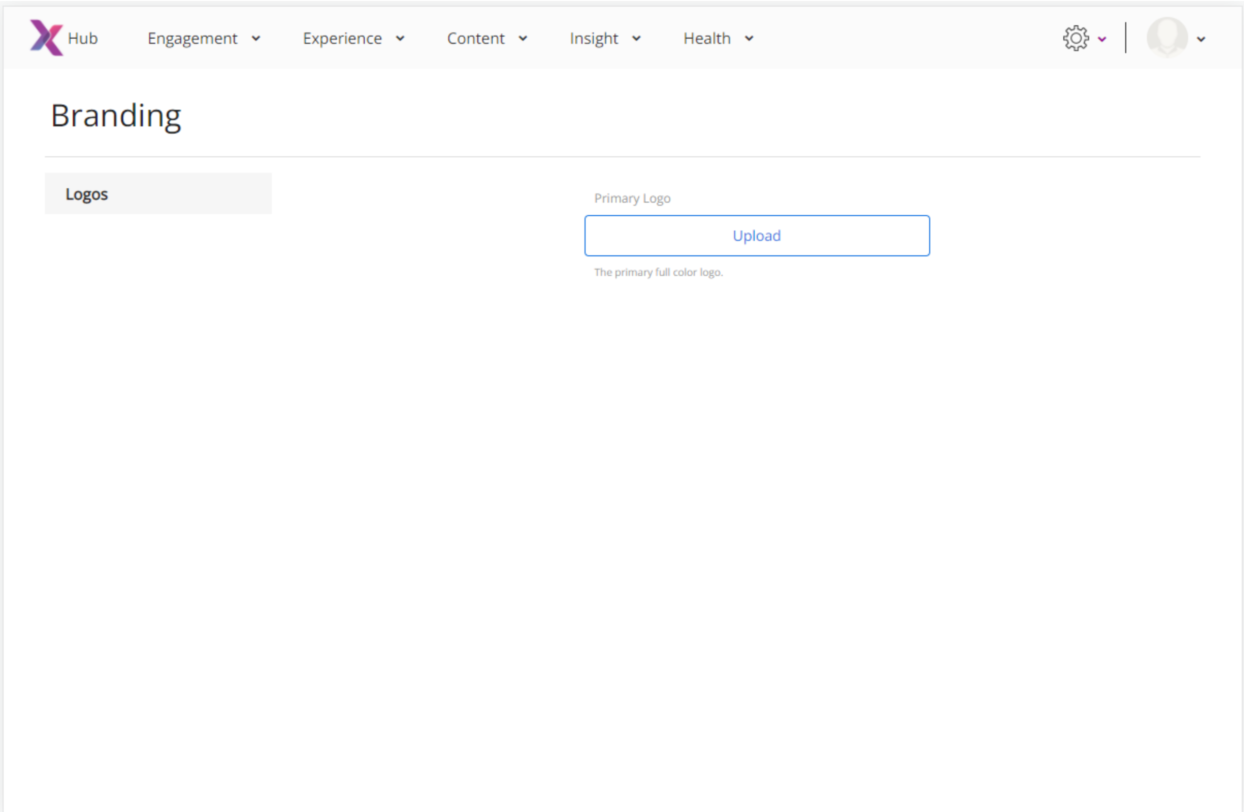


Figure 10. Settings - Branding page

SECTION 4: PROFILE

User logged into the system can see they profile information. This functionality is available for users with system role Admin and Manager.

Clicking on the 'Profile' icon on the header user will see the 'Profile' menu.

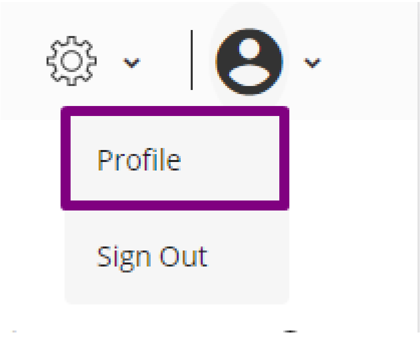


Figure 11. Profile drop-down

On the 'Profile Details' overview page all information related to the profile of the current user displays in read-only mode.

- First Name and Last Name,
- Title
- Email
- Company
- System Role
- Program Role
- Center Access
- Default Center
- User Last Login date

At the bottom of the screen Admin should see information about the person who created and modified this item:

Created by and Last Modified by:

- Photo
- First Name and Last Name
- Company
- Created time and date (HH:MM+am/pm+timezone - MM/DD/YYYY)

User can edit all information except 'Email'. User **cannot delete** they profile.

SECTION 5: USER PREFERENCES

Path: *User Profile icon > Preferences*

To help Briefing Managers see the general information on all briefings in their default center in one place we propose them subscribe to the “Weekly Debrief” email.

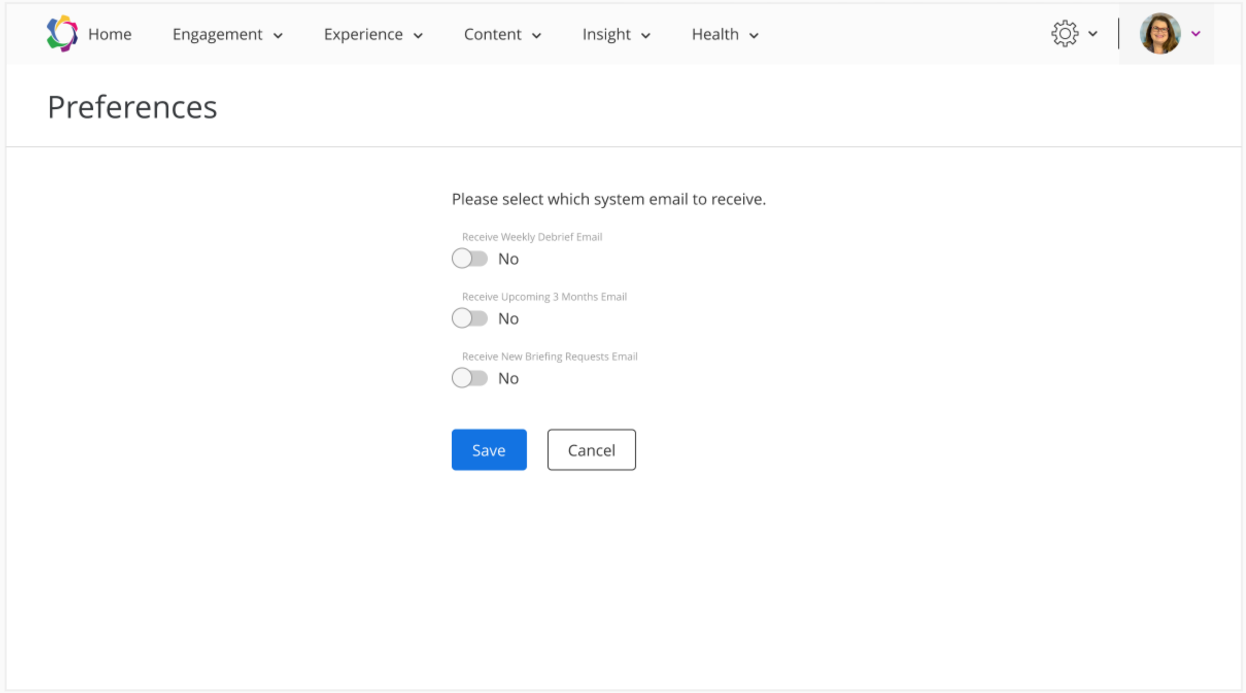


Figure 12. Preferences page

Toggle	Rules
Receive Weekly Debrief Email	As soon as the user turns on the toggle, they will be added to the list to receive this email. This email will go out to users **on Friday at 9am** based on the user’s default center location.
Receive Upcoming 3 Months Email	As soon as the user turns on the toggle, they will be added to the list to receive this email. This email will go out to users **on Friday at 9am** based on the user’s default center location.
Receive New Briefing Requests Email	As soon as the Program Staff user turns on the toggle, they will be added to the list to receive this email. This email will go out to users each time when the “SalesForce External Briefing Request” form submitted based on the user’s center access list

Weekly Debrief Email - Hitachi Santa Clara Insight Center

The Blackbird Team <email@blackbird.com>

To: James Tang

Hi James,

Here's the weekly debrief for Santa Clara Center.

This Week's Recap:

PAN - Cloud Security Data Infrastructure
Mon, Feb 8 | Evaluations Received: 8

IBM - Blockchain Analytics Management
Wed, Feb 10 | Evaluations Received: 4

VMware - Digital Security Artificial Intelligence
Thu, Feb 11 | Evaluations Received: 2

Next Week's Briefings:

Cloudera - Data Management
Tue, Feb 16 | 09:00 - 03:00 | Executive Briefing Room A

Tesla - Next Generation Lithium Technology
Wed, Feb 17 | 08:00 - 11:00 | Virtual
Thu, Feb 18 | 10:00 - 3:00 | Virtual

AAA - Essential Smarter Cloud Security
Wed, Jan 17 | 11:00 - 04:30 | Executive Briefing Room B

New Future Briefings Added:

Cisco - Quantum Hybrid Evolution of Cloud
Mon, Mar 8 | 08:30 - 03:30 | Executive Briefing Room A

Apple - AI Powered Data Analysis
Thu, Mar 18 | 10:00 - 04:30 | Virtual

UnitedHealth Group - Performance Optimization and Powerful Distribution
Wed, Apr 7 | 09:00 - 04:30 | Executive Briefing Room C

Figure 13. Weekly Debrief email

Upcoming 3 Month Briefings Email - Hitachi Santa Clara Insight Center

The Center-Suite Team <c-suite@center-suite.com>

To: James Tang

Hi James,

Here are the briefings in the next 3 months for Santa Clara Center.

Mon, Feb 08 | PAN - Cloud Security Data Infrastructure
Wed, Feb 10 | IBM - Blockchain Analytics Management
Thu, Feb 11 | VMware - Digital Security Artificial Intelligence
Tue, Feb 16 | Cloudera - Data Management
Wed, Feb 17 | Tesla - Next Generation Lithium Technology
Wed, Feb 17 | AAA - Essential Smarter Cloud Security
Mon, Mar 08 | Cisco - Quantum Hybrid Evolution of Cloud
Thu, Mar 18 | Apple - AI Powered Data Analysis
Wed, Apr 07 | UnitedHealth Group - Performance Optimization and Powerful Distribution

Figure 14. 3 Month Briefing Email

Hitachi Santa Clara Insight Center - Briefing Request

The Center-Suite Team <c-suite@center-suite.com>

To: Jane Doe

A new briefing request has been submitted.
https://signet.center-suite.com/platform/engagement/requests/4110

Briefing Info
Center Location: Santa Clara Center
Briefing Request Date: 02/24/2021
Alternate Briefing Request Date: 03/12/2021
Briefing Format: In-Person
Estimated # of Attendees: 12
Briefing Objective and Notes: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec lacinia accumsan libero, eu luctus nunc egestas sed. Praesent diam lectus, egestas et fringilla sit amet, tincidunt ac augue.
Requester Name: John Doe
Requester Email: johndoe@email.com

Opportunity Details
Opportunity Name: Cloudera CS Upgrade
Opportunity ID: 0065Y00001UZDgVQAX
Opportunity Amount: $1,000,000
Opportunity Probability: 75%
Estimated Opportunity Close Date: 02/01/2021
Opportunity Description: <text from sdfc>

Account Details
Account Name: Cloudera
Account CRM ID: 0015Y00002alZ2IQAU
Account Revenue: $10,000,000
Account Industry: Technology
Account Description: <test from sfdc>

Figure 15. Briefing Request Email for Program Staff

Hitachi Santa Clara Insight Center - Briefing Request

The Center-Suite Team <c-suite@center-suite.com>

To: Jane Doe

A new briefing request has been submitted.
https://signet.center-suite.com/platform/engagement/requests/4110

Briefing Info
Center Location: Santa Clara Center
Briefing Request Date: 02/24/2021
Alternate Briefing Request Date: 03/12/2021
Briefing Format: In-Person
Estimated # of Attendees: 12
Briefing Objective and Notes: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec lacinia accumsan libero, eu luctus nunc egestas sed. Praesent diam lectus, egestas et fringilla sit amet, tincidunt ac augue.
Requester Name: John Doe
Requester Email: johndoe@email.com

Account Details
Account Name: Cloudera
Account CRM ID: 0015Y00002alZ2IQAU
Account Revenue: $10,000,000
Account Industry: Technology
Account Description: <test from sfdc>

Figure 16. Briefing Request Email for Program Staff (no Opportunity part)

SECTION 6: HOME

This page was designed in a way to allow user to easily view a list with Today's and Upcoming briefings for the exact Briefing Center.

Starting from the Home page by default user will see briefings for their Default Center.

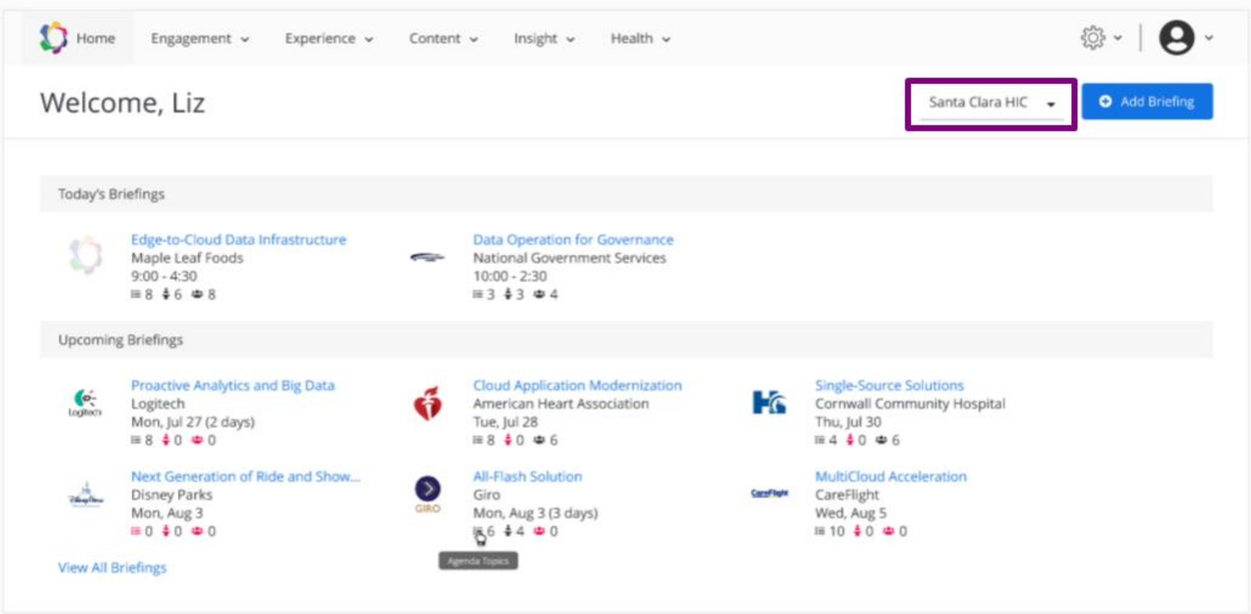


Figure 17. Home page

If user associated with more than one center, then user should see other centers into the Center drop-down.

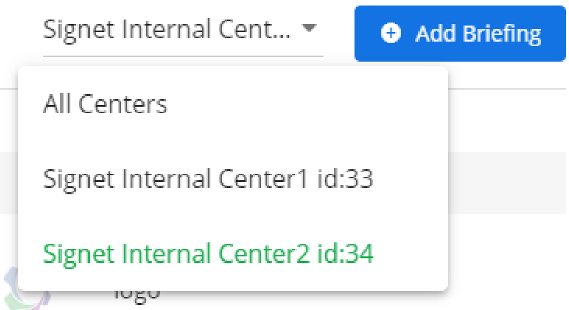


Figure 18. Drop-down with associated centers

If a briefing takes more than one day, on the Home page user should see the exact number of days for that briefing.

On the Home page should displayed **ALL** today's briefing and only **FIRST SIX** upcoming briefings. To view the full list of today's and upcoming briefing user should click on 'View All Briefings' hyperlink located at the bottom of the screen. This link will forward user to the Engagement – Briefings page.

For each briefing we add alert icons:

- Agenda Topics

- Speakers
- External Attendees

These icons should inform briefing manager which information already added, and which one needs to be added.

If there are no items added for 'Agenda Topics' and/or 'Speakers' and/or 'External Attendees' icons should become red.

Hovering over the icon will display its name: 'No Agenda Topics', 'No Speakers', 'No Attendees'.

If there is at least one item added for 'Agenda Topics' and/or 'Speakers' and/or 'External Attendees' icons should become black.

Hovering over the icon will display its name: 'Agenda Topics', 'Speakers', 'External Attendees'.

Figure 19. Alert icons

SECTION 7: ENGAGEMENT

7.1. CALENDAR

Path: Engagement > Calendar

7.1.1. MONTHLY CALENDAR

Starting from the August release the month calendar view will be selected by default. The user can still switch between the weekly and month views using a toggle.

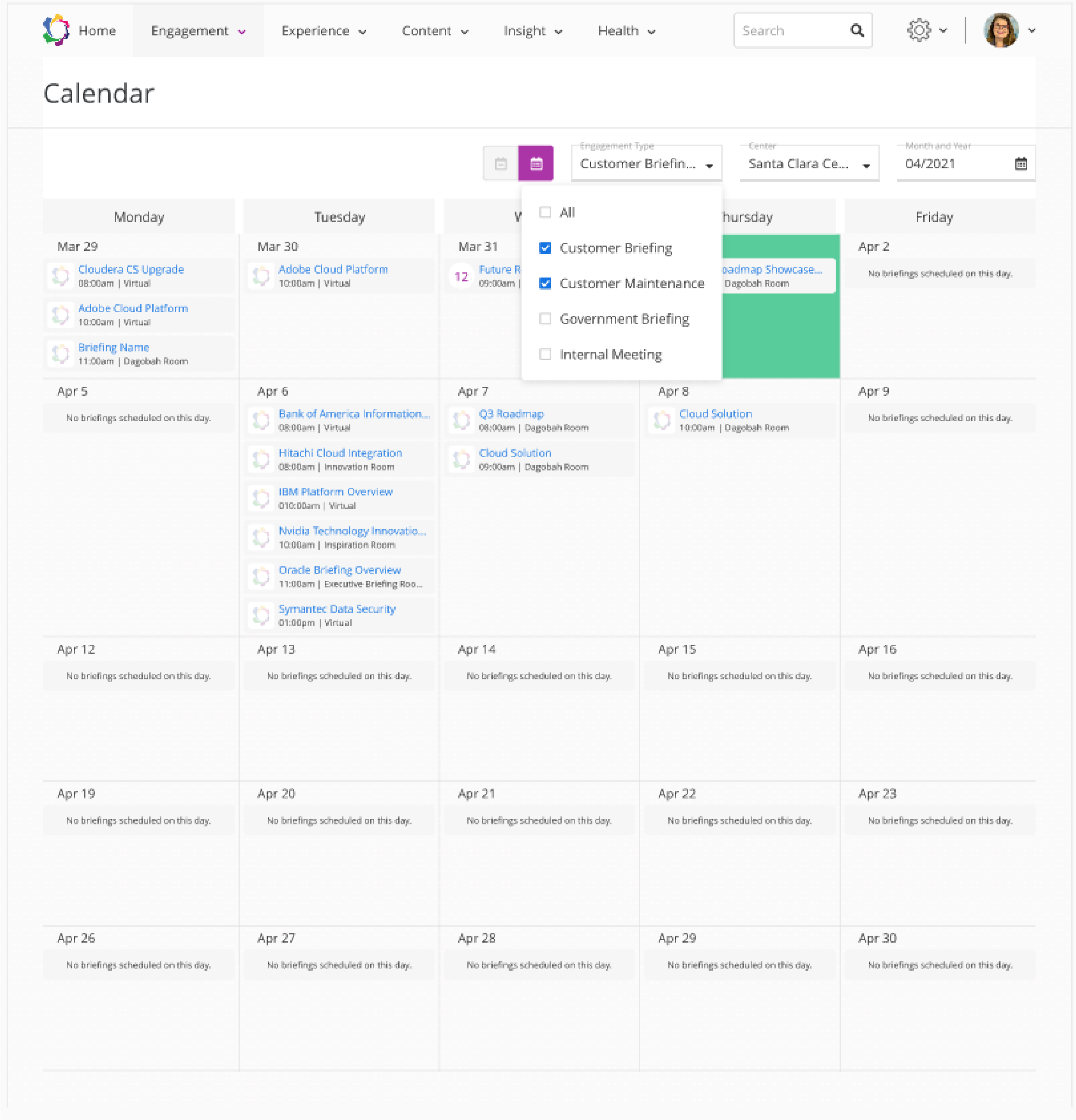


Figure 20. Month calendar view

CENTER DROP-DOWN:

- User default center will be selected by default

- There is no option "All Center", user can select only one center per time

ENGAGEMENT TYPES DROP-DOWN:

- "All" engagement types option selected by default
- User can select a specific engagement type (except "Test" engagement type)
- The briefings with a status "Postponed" should not be displayed on the Calendar view

CALENDAR VIEW:

- The monthly calendar contains the table with briefings starting from Monday till Friday (no weekends included)
- Today's date will be highlighted with green color
- Briefings will be ordered by start time
- Multi-day briefings will be shown in separate cards for each day
- For the 3-days briefing, the first day will show "Day 1 of 3" etc.

7.1.2. WEEKLY CALENDAR

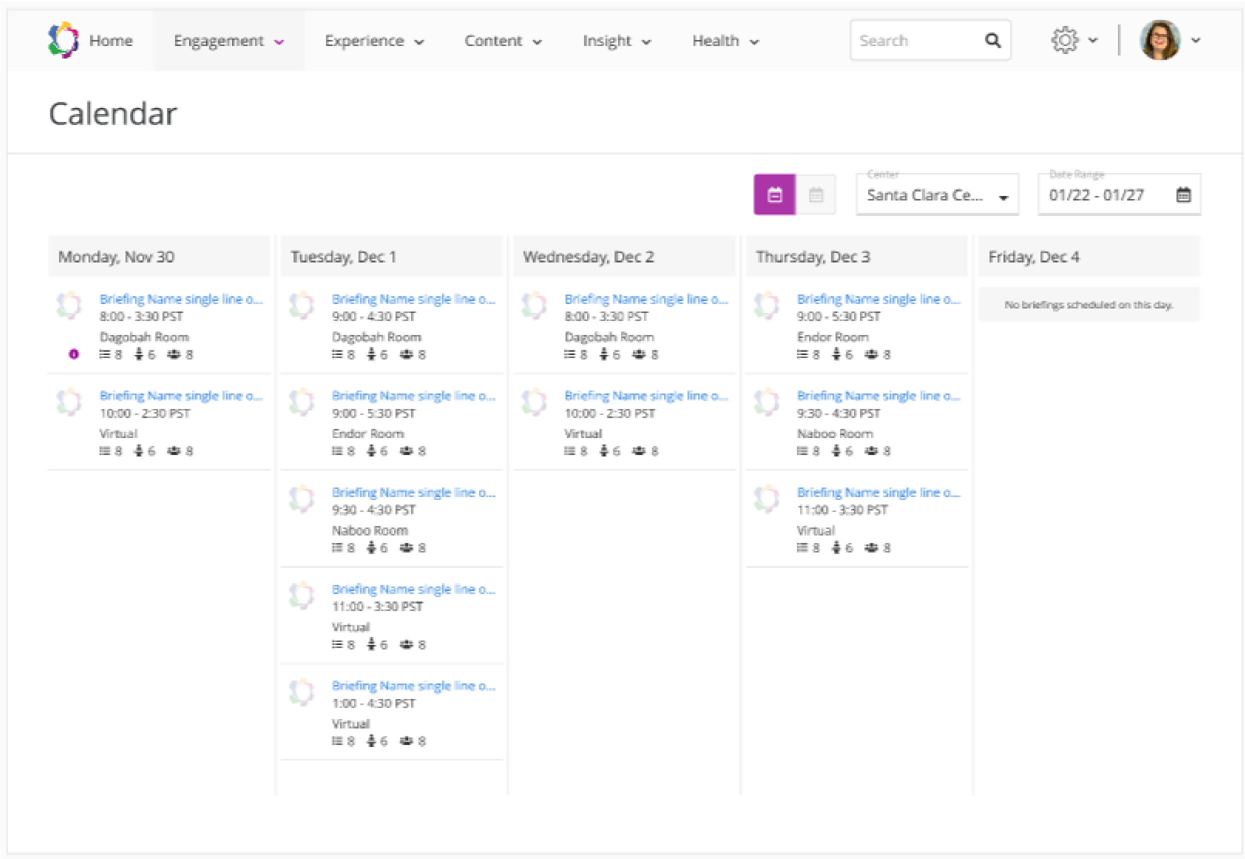


Figure 21. Calendar View

The Calendar page is another place where user can view all active briefings scheduled for the current week.

The Briefing Name is clickable and navigates the user to Briefing Details page.

The multi-day briefing will be shown on each day it will be created.

If there will be no briefings scheduled during the day - there will be text "No briefings scheduled on this day".

DEFAULT VALUE:

1. By the default the user will see the default center inside the Center drop-down. The user can choose only 1 center per time, there are no option "All Center".
2. By the default the current week will be displayed inside the Date Range filter. The week will last from Monday to Friday.

If user wants to change the date range, they need to select one day, and the filter will automatically open the week with this date.

7.2. BRIEFING MANAGEMENT

One of the important parts of **CenterSuite Platform** is Scheduler. With the Briefings menu, user can manage briefings during their lifecycle.

On Briefings page user can see the list with already created briefings divided by the briefing statuses (Active, Completed, Postponed).

On the Briefings page the same as on the Home page by default user will see briefings for their Default Center.

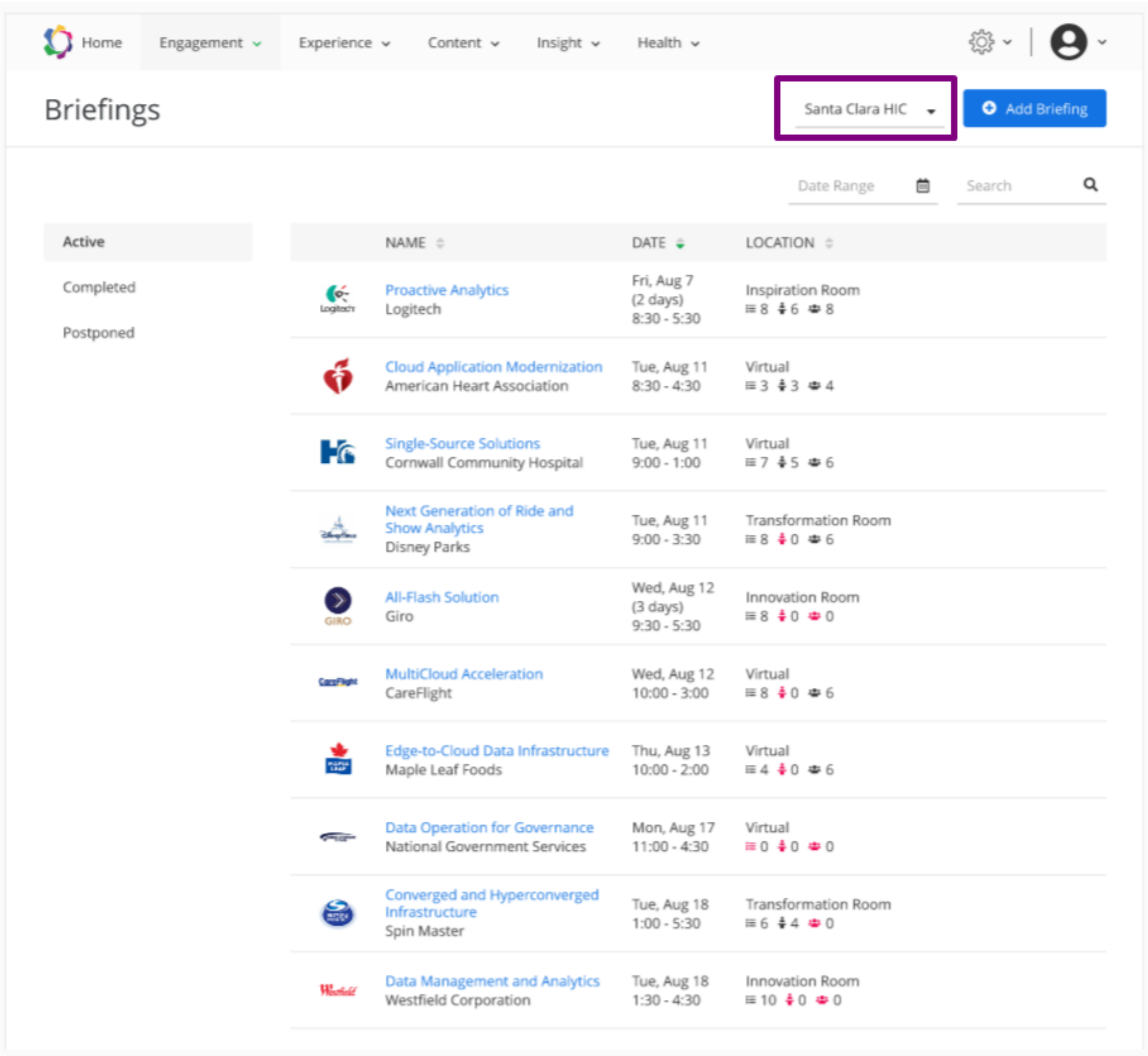


Figure 22. Briefings list (Active status)

If user associated with more than one center, then user should see other centers into the Center drop-down.

All briefings in the list have following elements:

- Company logo

- Briefing name
- Briefing date and duration
- Briefing Location
- Alert icons

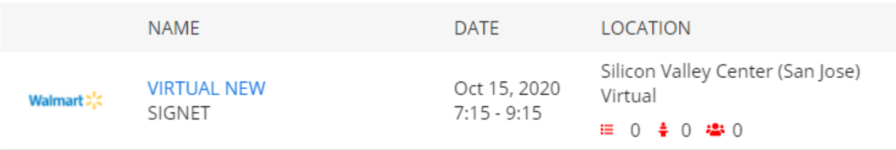


Figure 23. Briefing main elements

I er
can select a range from a past date to the current date. The selected date range cannot be greater than one year.

On the Briefing page user can see the previously created briefings, make a change, and create a new briefing.

CREATE A NEW BRIEFING

User can create a new briefing by clicking on 'Add Briefing' button.

Field	Data
Engagement Type	1. Required 2. Drop-down with the list of Engagement Types from the Settings 3. Error message: Engagement Type is required
Company Name	1. Required 2. Type ahead field with the list of accounts 3. Depending on the Briefing Type the name of the Company Name field will change: - Customer Briefing type -> "Customer Name" field - Partner Briefing type > "Partner Name" filed - Internal Meeting type > no "Company Name" field - Test Briefing type > "Customer Name" filed - Custom briefing type(s) > "Customer Name" filed 4. Error message: Company Name is required
Briefing Name	1. Required 2. Freeform text field 3. Max length: 100 characters 4. Error message: Briefing Name is required

Briefing Format	1. Required 2. Drop-down with the options - "In-person" and "Virtual" 3. Error message: Briefing Format is required
Center	1. Required 2. Drop-down with the list of Center(s) available to the user 3. Error message: Center is required
Briefing Manager	1. Required 2. Type ahead field 3. Auto-filled with the user's First Name and Last Name who is setting up the briefing 4. Error message: Briefing Manager is required
Briefing Date	1. Required 2. Day picker 3. Single-day only 4. Error message: Briefing Date is required
Start Time	1. Required 2. Drop-down with the option to select the time period - Time increments: 15 min - Time start list: 5 am - Time end list: 11:45 pm - 'Start Time' should be less than 'End Time' 3. Error message: Start Time is required
End Time	1. Required 2. Drop-down with the option to select the time period - Time increments: 15 min - Time start list: 5 am - Time end list: 11:45 pm - 'End Time' should be greater than 'Start Time' 3. Error message: End Time is required

Meeting Room – ***available for the Virtual briefings also***	1. Required 2. This drop-down is available for all briefing formats – In-Person/Virtual 3. Drop-down with the list of rooms that belong to the specific Center 4. For the Virtual briefing user can select option “No Room Needed” 5. Error message: Meeting Room is required
Add Additional Day	1. Text link 2. Option to add an additional briefing day

CREATE A NEW BRIEFING WITH MULTI-ACCOUNTS (new functionality)

User is able to create a briefing for more than one company account. That option is available for the briefings with engagement types – Customer, Partner, Test.

User doesn't have any limitation in the number of accounts that they can add to the briefing.

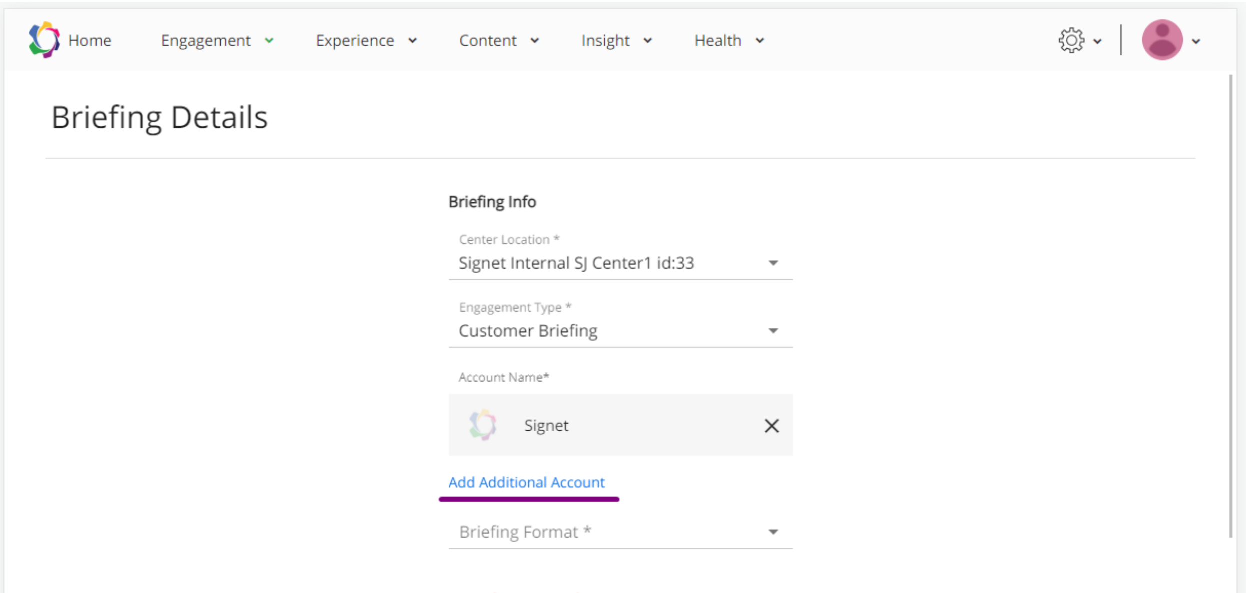
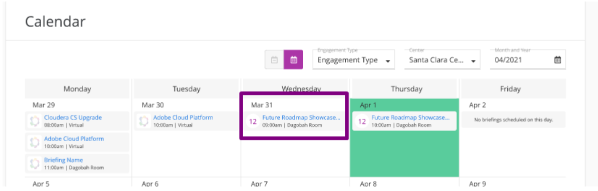
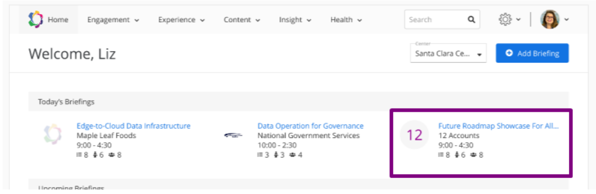
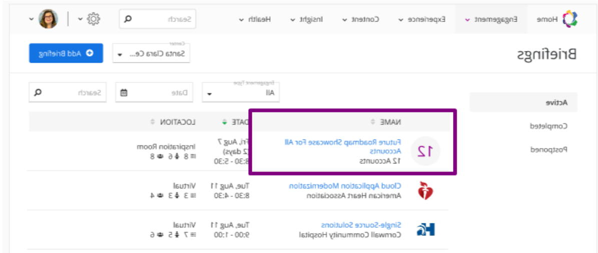
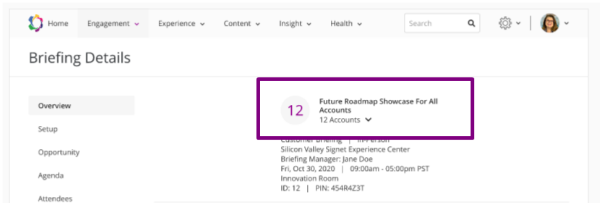
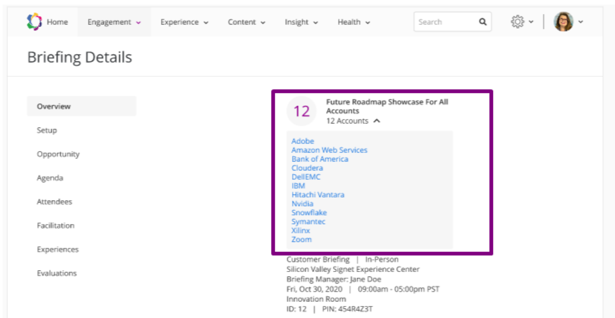


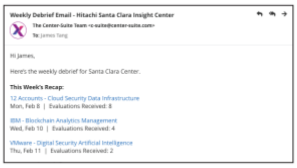
Figure 24. Briefing Details - Add Additional Account text link

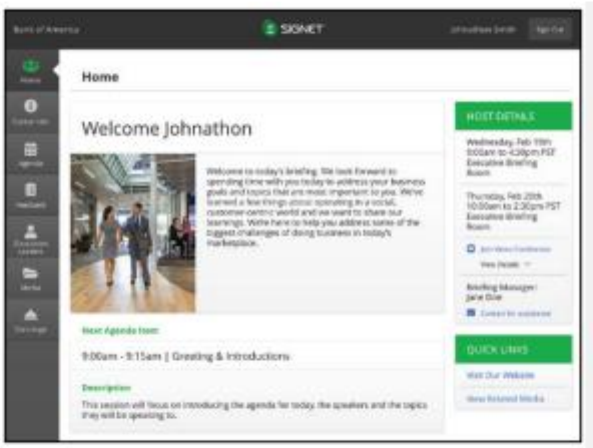
Depends on the engagement type user can select only a specific type of accounts (Customer/Partner). The accounts cannot be mixed into one engagement type.

- For the Customer engagement type the user is able to select only Customer accounts.
- For the Partner engagement type the user is able to add only Partner accounts.
- For the Test engagement type the user is able to select only Customer accounts.

MULTI-ACCOUNTS IN RELATED PRODUCTS:

Functionality	Description	UI
Calendar	Instead of account logo user will see total number of accounts	
Home page	Instead of account logo user will see total number of accounts	
Briefings page	Instead of account logo user will see total number of accounts	
Briefing Overview Page	Instead of account logo user will see total number of accounts	
	Clicking on expand arrow user can see a full list of accounts.	
Insight - Analytics	The accounts in the multi-account briefings under the “Customer Name” column will be displayed separated by a comma on the App Usage page	

<table>
<tr><td></td><td>The briefing that contains any of the industry selected will appear on the all 3 tabs of the Analytics page</td><td></td></tr>
<tr><td>Weekly emails</td><td>The account name will be replaced by “# Accounts” for multi-account briefings.</td><td>


</td></tr>
<tr><td rowspan="6">Customer Portal</td><td>Multi-Account Briefings will ONLY show the briefing name in the header.</td><td rowspan="6">
</td></tr>
<tr><td>If a briefing has one account, the user can decide to show the company name or briefing name in the header.</td></tr>
<tr><td>If a briefing has 2 or more accounts, then it will automatically show the briefing name in the header.</td></tr>
<tr><td>No logo will be shown next to the welcome “attendee name”</td></tr>
<tr><td>Media in the CE App will show media for any/all account industries</td></tr>
<tr><td></td></tr>
<tr><td></td><td>For briefings with multiple accounts, the</td><td></td></tr>
</table>

<table>
<tr><td rowspan="3">Virtual Warmer</td><td>industry backgrounds will be set to General</td><td rowspan="3">
</td></tr>
<tr><td>Multi-Account Briefings will not show any logos on the client welcome screens.</td></tr>
<tr><td>The welcome text and briefing name will align to the left like existing client welcome with no logos</td></tr>
<tr><td rowspan="3">Signet Player:
- Welcome Screen
- Room Warmer
- Door Monitor</td><td>For briefings with multiple accounts, the industry backgrounds will be set to General</td><td rowspan="3">
</td></tr>
<tr><td>Multi-Account Briefings will not show any logos on the client welcome screens</td></tr>
<tr><td>The welcome text and briefing name will align to the left like existing client welcome with no logos</td></tr>
</table>

ROOM CONFLICT

When a Briefing Manager creates a new briefing, setups, duplicates, or converts a request into a briefing, on the Meeting Room drop-down some room can be marked as "booked" (meeting room will be greyed out).

User cannot select the same room for two briefings if they scheduled for the same day and time.

Only one exception, for the briefings with engagement type "Test" user can select any room, no rooms will be disabled and labeled as "Booked".

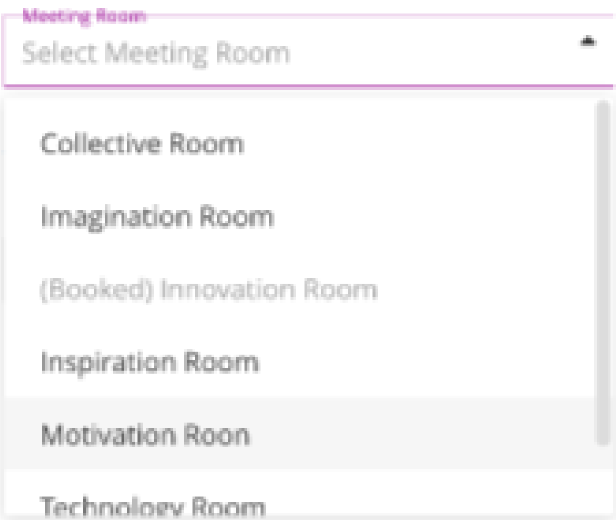


Figure 25. Room Conflict

CREATE A NEW CUSTOMER/PARTNER INSIDE BRIEFING FORM

If the user does not see the company they want, they can choose to add a new company by pressing a button. This will trigger appearance of the Add Company pop-up window.

Field	Data
Account Type	1. Pre-filled 2. Customer Briefing/Test Briefing/custom briefing types – the account type "Customer" 3. Partner briefing type – the account type "Partner"
Company Logo	1. Optional 2. Upload button 3. Supported files: png, jpeg, jpg 4. Max file size: 50 MB

	5. Helper text: 'Optimal media size is 500px wide or 500px tall.'
Account Name	1. Required 2. Freeform text field 3. Max length: 60 characters 4. Account name should be unique 4. Error message: Account Name is required
Account CRM ID	1. Optional 2. Freeform text field 3. Max length - 18 symbols 4. Field accepts also special symbols (!@$), numbers
Account Revenue	1. Optional 2. Empty field shows without '$' symbol 3. Add the '$' symbol at the beginning of the field after the user filled in some information 4. When the user editing that filed - hide the '$' symbol 5. Separate the classes and digits with commas ($1,234,567) 6. Max length - 50 symbols - only numbers 7. Separate decimal values with a dot ($1,234,567.89) 8. Max length after dot - two symbols
Key account toggle	1. Optional 2. Toggle with YES/NO options 3. NO (off) set by default
Industry	1. Required 2. Drop-down with a list of Industries 3. Error message: Industry is required
Description	1. Optional 2. Freeform text field 3. Max length: 1000 characters

After filling all required fields 'Submit' button should become active and after that user can finish a new briefing creation

7.1.1. BRIEFING OVERVIEW (new page layout)

Clicking on briefing name user navigates to Briefing Details screen -> Overview tab.

The Briefing Name and briefing account logo will be displayed on the header. Long Briefing Name should be hide with ellipsis at the end of the text container.

The buttons like Postpone, Duplicate, Delete we moved to the title and grouped them to the **"Actions" drop-down.**

All action buttons will be available for the Pre-Briefing state (before the briefing has started).

Only Duplicate and Delete action buttons will be available the During (when the briefing start time comes)/Post-Briefing states (when the briefing end time ends).

We reorganized the content on the Briefing Overview page to the section.

Briefing Details section will contain the following information:

- Account or number of accounts
- Engagement type and briefing format
- Location
- Briefing Manager
- Briefing date and time
- Briefing Room
- Briefing PIN

Engagement Reports section will contain the link to the Planning report (for active briefings) and Wrap-Up report (for the completed briefings).

Launch drop-down contains the following options**:**

- Virtual Warmer
- Customer Portal

Email drop-down (will be visible only for users with role "Program Staff") contains the following options**:**

- Calendar Invite
- Customer Portal Direct Access Link
- Customer Portal General Access Link

Print drop-down contains the following options**:**

- Agenda Sheets
- Attendee Seat Tent

Copy drop-down contains the following options**:**

- Customer Portal General Access Link
- Customer Portal QR Code
- Virtual Warmer Link

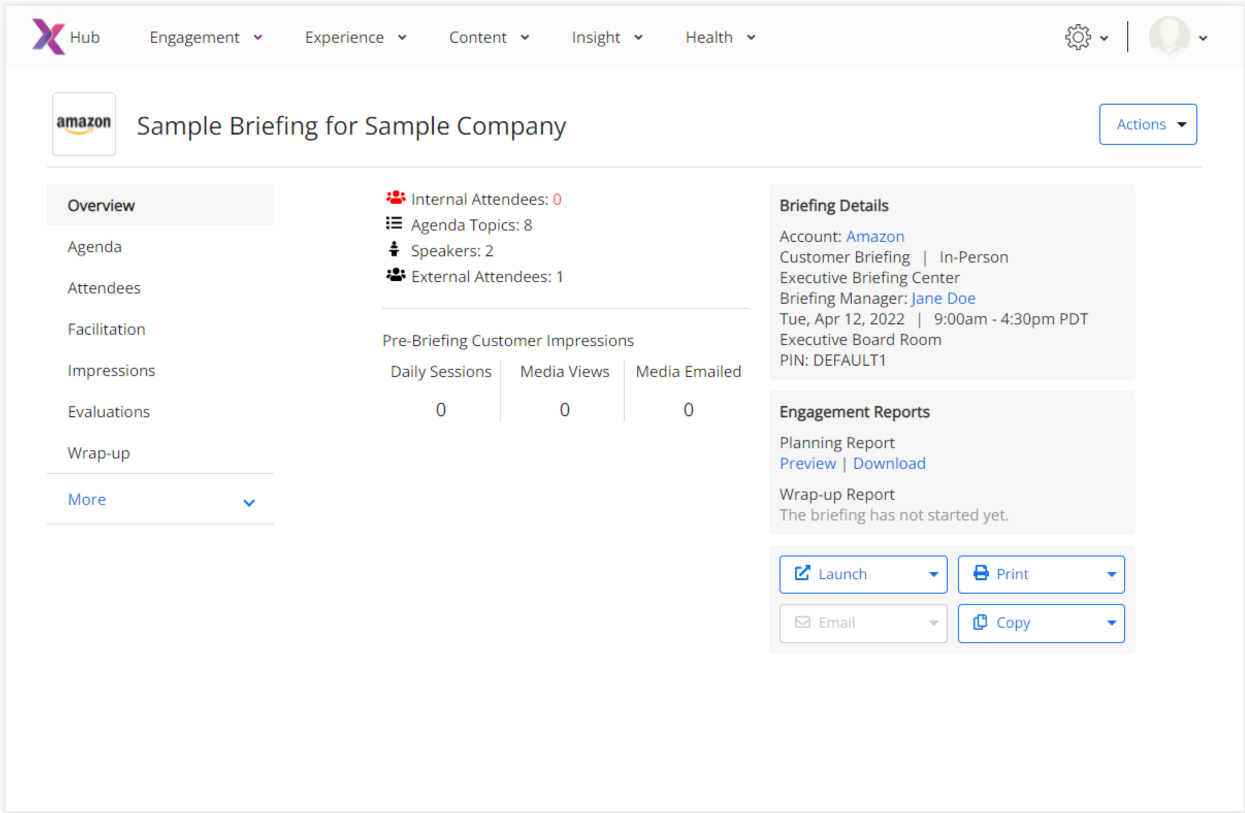


Figure 26. Briefing Details - Overview for the active briefing (pre/during briefing states)

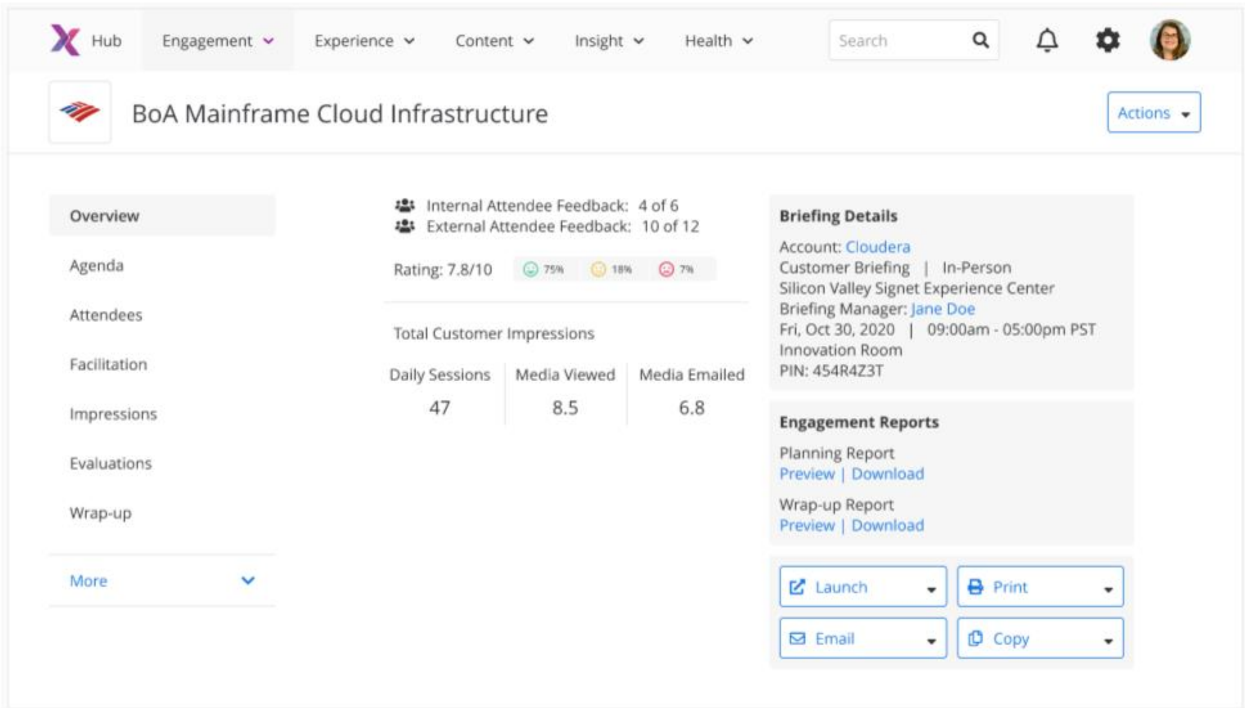


Figure 27. Briefing Details - Overview for completed briefing

7.1.2. ENGAGEMENT REPORTS (new functionality)

For each briefing user is able to generate reports:

- The Planning report should be available during all stages of the briefing except "Postpone"
- The Wrap-up report available only during the During/Post-briefing state. The Wrap-up report is not available for Postponed briefing.

Both reports will be available for all engagement types.

CONTENT FOR PLANNING REPORT:

- **Engagement details** with the information about briefing (account logo, location, room name, briefing date and time and objective for briefing request)
- In case briefing converted from the Salesforce or internal request (expect converted briefings with engagement type Internal) user sees **the information about Opportunity and/or Account**
- **Agenda** section with the list of topics and discussion leaders
- List with **briefing attendees** (customer (external) and internal)

CONTENT FOR WRAP-UP REPORT:

- **Engagement details** with the information about briefing (account logo, location, room name, briefing date and time and objective for briefing request)
- **Voice of the Customer Notes *(please see section 7.1.14)***
- **Wrap-Up Notes *(please see section 7.1.14)***
- **Agenda section** with the list of topics and discussion leaders
- In case briefing converted from the Salesforce or internal request (expect converted briefings with engagement type Internal) user sees **the information about Opportunity and/or Account**
- **Attendee Evaluation Feedback** separately for internal and external attendees and avarage rating (the average total (answers submitted by the external/internal attendees calculated from all speakers).

  Avg Sentiment Formula - Questions with level 'Agenda Speaker" in a Format "Freeform Text Input" / number of the submitted responses (regarding all speakers assigned to this briefing).
- **Total Media Engagement** - top 5 media engagement items that were viewed and emailed in the Customer Portal by the external attendees.

7.1.3. SETUP BRIEFING

User navigates to that page selecting ‘Setup’ on the left Navigation menu. On that page user can change all information except Center. The Center drop-down should be disabled and user cannot select another center for already created briefing.

NOTES:

User can change ‘Briefing Start Time’ and/or ‘Briefing End Time’ only after removing corresponding agenda items

7.1.4. AGENDA MANAGEMENT AND SPEAKER AVAILABILITY (new functionality)

NOTES:

All previously created agenda items will be migrated to the current version of the product. All these items will be assigned to the Topic – Custom Topic.

If the agenda item had a speaker and linked evaluation questions, then this information will be shown on the CE Client App – Feedback tab.

When a briefing is created, it will automatically select one of the agenda templates from the Settings (based on engagement type selected) to be applied when the user goes to the Agenda tab in Briefing Details.

After briefing has been created then the agenda becomes independent of the template from which it was taken.

- Customer single day virtual briefing → Customer single day virtual agenda template
- Customer multi-day virtual briefing → Customer multi-day virtual agenda template
- Customer single day in-person briefing → Customer single day in-person agenda template
- Customer multi-day in-person briefing → Customer multi-day in-person agenda template

- Partner single day virtual briefing → Partner single day virtual agenda template
- Partner multi-day virtual briefing → Partner multi-day virtual agenda template
- Partner single day in-person briefing → Partner single day in-person agenda template
- Partner multi-day in-person briefing → Partner multi-day in-person agenda template

- Test single day virtual briefing → Test single day virtual agenda template
- Test multi-day virtual briefing → Test multi-day virtual agenda template
- Test single day in-person briefing → Test single day in-person agenda template
- Test multi-day in-person briefing → Test multi-day in-person agenda template

- Internal single day in-person or virtual briefing → Internal single-day with the Blank Topic
- Internal multi-day in-person or virtual briefing → Internal multi-day with the Blank Topic for each day

The agenda items duration should be autocompleted with the time based on:

- the first agenda item start time = briefing start time
- the first agenda item end time = briefing start time + duration
- the following agenda items should be calculated based on the duration indicated in the brackets

ADDITIONAL CASES:

- In case a briefing duration is shorter than the full agenda template → paste as many agenda items from the related template as possible
- In case the last agenda item from the related template is longer than the rest of the briefing duration → we show it with the rest of the time agenda template
- In case the user creates a single day briefing and then changed it to the multi-day briefing → on the Agenda page add an additional day with one blank agenda item with a duration of 15 min (like Internal agenda template).
- In case the user filled in all available time slots → hide the "Add Agenda Item" button

SPEAKER AVAILABILITY (new functionality)

This functionality will be available only Office365. Before start using it the support/admin department on the customer side should install a separate application that has been developed by Signet dev team to get permission to see Office365 users calendar availability.

More information you can find here:

https://signet.atlassian.net/wiki/spaces/CBA/pages/2417721395/Speaker+availability+-+o365

https://docs.microsoft.com/en-us/graph/auth-v2-service

When we got access to the tenant Office365 then we can see a speaker availability based on their calendar in our product.

When Briefing Manager scheduling agenda they can see the status for a specific speaker based on the agenda start time and topic duration.

A speaker availability status will be displayed in a separate section.

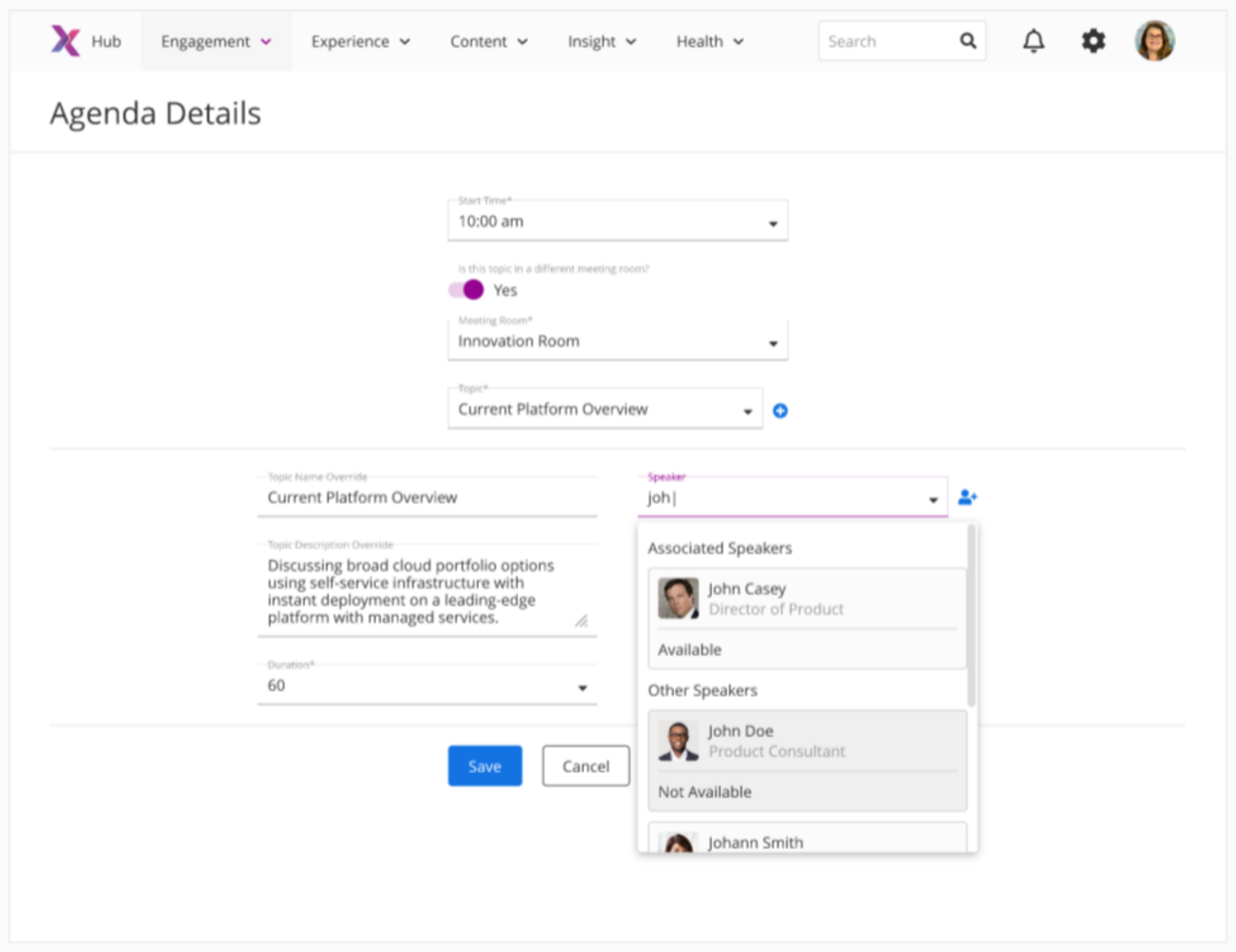


Figure 28. Agenda Details page with speaker availability status

For customers that do not provide us access to their Office365 we will display information about speaker without availability section.

EDIT/DELETE EXISTING AGENDA ITEM INSIDE THE DEFAULT TEMPLATE

Clicking on the "Edit" button located on the agenda item or agenda topic name user navigates to the Agenda Details form.

The "Agenda Details" contains the autocompleted information.

Field	Completed information	Value
Start Time	- agenda start time - user can select new start time - Start Time should overlap another agenda item	- required - the drop-down with the list of available time slots

Is this topic in a different meeting room?	- toggle allows the booking of a second room for that agenda item - set NO(OFF) by default - toggle is YES(ON) - user is able to set the agenda item in a different meeting room. *For example, if Room A is booked for the briefing and there are two groups that may split out with two Agenda items happening at the same time, the second group can go to Room B.*	- optional - toggle with ON/OFF options
Meeting Room	"Is this topic in a different meeting room?" toggle is YES(ON) user can select another meeting room from the drop-down	- required - the drop-down with the list of available rooms for the Center selected in the briefing
Topic	topic name specified	- required - the drop-down with the list of Topics assigned to the Center
Topic Name Override	- duplicate information from the "Topic" field - user can override topic name	- optional - freeform text field
Topic Description Override	- the existing description related to the selected topic - user can override topic description	- optional - freeform text field

Duration (min)	- duration related to the topic - user can change the duration - the agenda end time will be calculated based on AgendaStartTime and duration	- required - the drop-down with the list of available time slots
Speaker	- empty - user can assigned speaker to the selected topic - multiple speaker selection is available - user can create a speaker inside the Agenda Topic page - user can create no more than 10 speakers per agenda item	- optional - the drop-down with the list of Speakers available for the selected Center - in first order user will see speakers associated with the selected agenda topic
Show Speaker toggle	- change toggle name from Show Speaker in Customer Portal to Show Speaker - Helper text: *This will display the speaker in the CE App and Virtual Welcome*.	
Include Speaker in Evaluation toggle	- toggle set YES (ON) by default - toggle YES → speaker will display on the CE App - Feedback page	

	- toggle NO → speaker should not display on the CE App - Feedback page - Helper text: *This will display the speaker in the feedback section.*	

Click on the “Delete” button user can remove the selected agenda from the list.

CREATE A NEW AGENDA ITEM

User can create a new agenda item by clicking on 'Add Agenda Item' button.

The agenda items will be added in their appropriate time slot/order based on the 'Start Time' information

Field	Data
Briefing Day	1. Required 2. Drop-down with dates related to the briefing 3. Error: Briefing Day is required
Start Time	1. Required 2. Drop-down with the option to select the time period - Time increments: 5 min - Time start list: 5 am - Time end list: 11:45 pm - 'Start Time' should be less than 'End Time' 3. Error message: Start Time is required
End Time	1. Required 2. Drop-down with the option to select the time period - Time increments: 5 min - Time start list: 5 am - Time end list: 11:45 pm - 'End Time' should be greater than 'Start Time' 3. Error message: End Time is required
Topic	1. Required 2. Drop-down with a list of topics from Engagement - Topics 3. Error message: Topic is required
Topic Name Override	1. Optional 2. Can be prefilled with the information from Topic Details 3. Freeform text field 4. User can override the Topic Nome. The new overridden name will be displayed in the corresponding

	products 5. Max length: 250 characters
Topic Description Override	1. Optional 2. Can be prefilled with the information from Topic Details 3. Freeform text field 4. User can override the Topic Description. The new overridden description will be displayed in the corresponding products 5. Max length: 2500 characters
Include in Evaluation	1. Optional 2. Toggle with YES/NO options – YES – topic and it description will be displayed in CE App – Feedback/Agenda and Virtual Welcome screen – NO – topic and it description will be hidden in CE App – Feedback/Agenda and Virtual Welcome screen 3. Position (YES/NO) corresponds to the position of the same toggle from the Topic Category
Speaker Name	1. Optional 2. Drop-down with a list of speakers available in the system
Show Speaker in Customer Portal	1. Optional 2. Toggle with YES/NO options – YES – selected by default – NO – user can hide the speaker in CE App – Feedback/Agenda and Virtual Welcome screen
Add Additional Speaker	1. Text link 2. Option to add an additional speaker 3. User can add maximum of up to 10 speakers for one agenda item

CREATE A NEW SPEAKER INSIDE AGENDA ITEM DETAILES FORM

If the user does not see the speaker they need, they can create a new speaker inside Agenda Details form.

Field	Data
Speaker Headshot	1. Optional 2. Upload button 3. Supported files: png, jpeg, jpg 4. Max file size: 50 MB 5. Helper text: 'Optimal media size is 400px wide or 400px tall.'
Speaker First Name	1. Required 2. Freeform text field 3. Max length: 100 characters 4. Error: Speaker First Name is required
Speaker Last Name	1. Required 2. Freeform text field 3. Max length: 100 characters 4. Error: Speaker Last Name is required
Speaker Title	1. Required 2. Freeform text field 3. Max length: 250 characters 4. Error message: Speaker Title is required
Speaker Email	1. Optional 2. Freeform text field 3. Max length: 250 characters
Description	. 1. Optional 2. Freeform text field 3. Max length: 1000 characters
Center	. 1. Required 2. Drop-down with a list of Centers 3. Center indicated in the Briefing filled in by default 4. User can uncheck Center indicated in the Briefing

7.1.5. OPPORTUNITY

The Opportunity tab available for each briefing (converted from the Customer Briefing Requests or not).

If the briefing does not require any Opportunity information, then the user can leave the Opportunity tab blank.

BRIEFING CONVERTED FROM CUSTOMER BRIEFING REQUEST

In case the Briefing was converted from a Customer Briefing Request that had completed Opportunity section the information of that should be already displayed on the page.

User should see original information related to the Opportunity Data and Opportunity Details from the Customer Briefing Request form.

User can see only one opportunity per briefing.

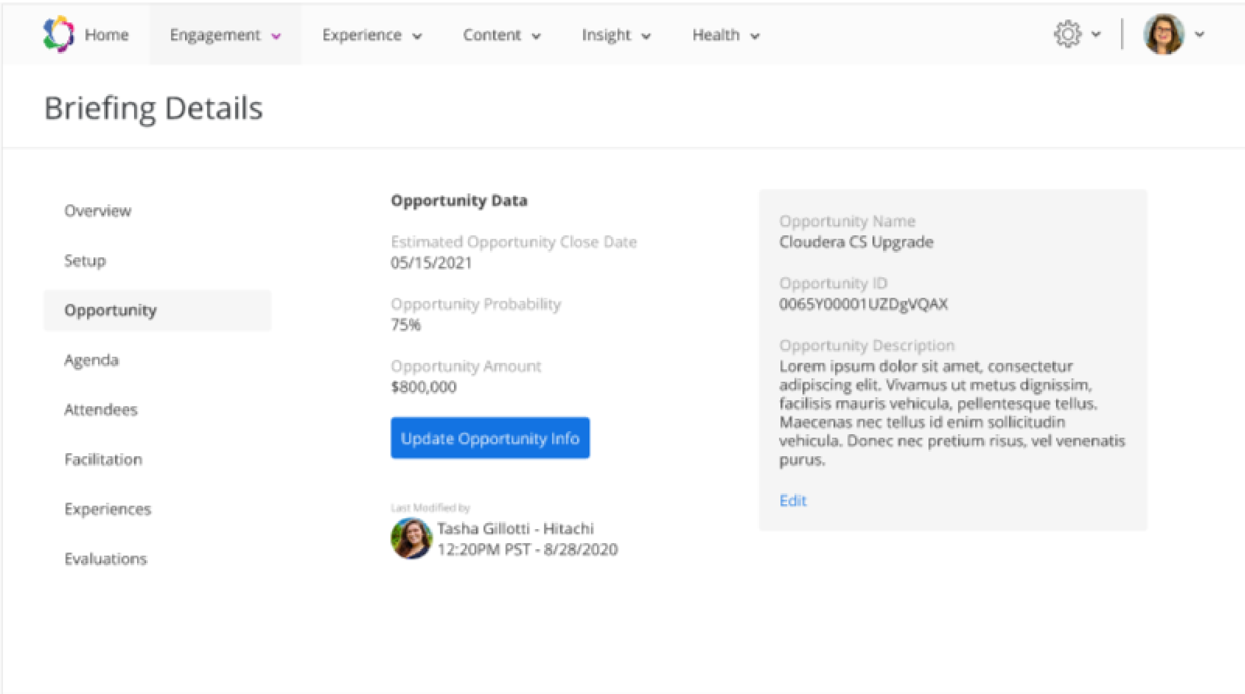


Figure 29. Opportunity page with original opportunity data and details

UPDATE THE OPPORTUNITY DATA:

Clicking on the “Update Opportunity Info” button user can update opportunity data and opportunity status (open/close).

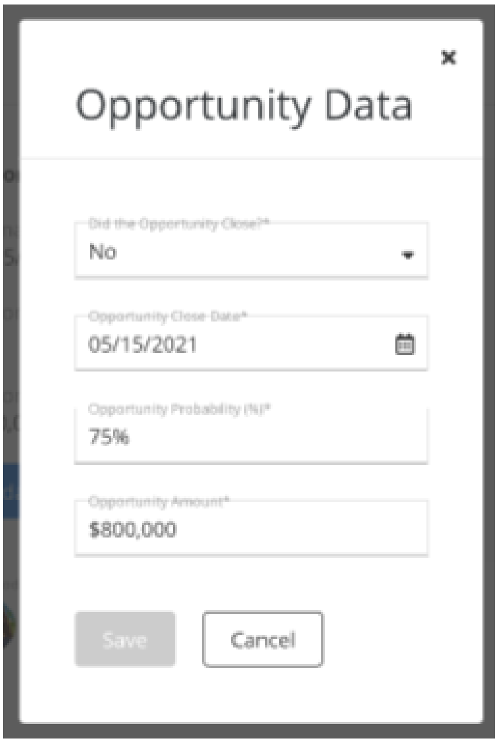


Figure 30. Opportunity Data modal window

All changes should be displayed on the top of the Opportunity page.

Did the Opportunity Close?

- drop-down with Yes/No options
- until the deal does not close the **"No"** option should be displayed
- If the user selects **"Yes"** for "Did the Opportunity Close?" then the "Opportunity Close Date" will default to today's date and the "Opportunity

Opportunity Close Date

- User can change the planned Close Date
- When user save changes, they should see the difference in days between the planned date and the new close date
- Information if the opportunity plan close faster/slower/not changed
- Show new close date
- Date picker time zone according to the time zone for the center in which the briefing takes place

Opportunity Probability (%)

- User can change the probability percentage of the final deal
- When user save changes, they should see the difference in % between the planned opportunity probability and the new one
- Information if the opportunity probability increased/decreased/not changed
- Show new probability percentage

Opportunity Amount

- User can change the opportunity amount
- When user save changes, they should see the difference in monetary terms between the planned and the new opportunity amount
- Information if the opportunity amount increased/decreased/not changed
- Show new opportunity amount

After clicked on the "Save" button user will see one section with the Original Opportunity Data and information about opportunity status and changed component(s).

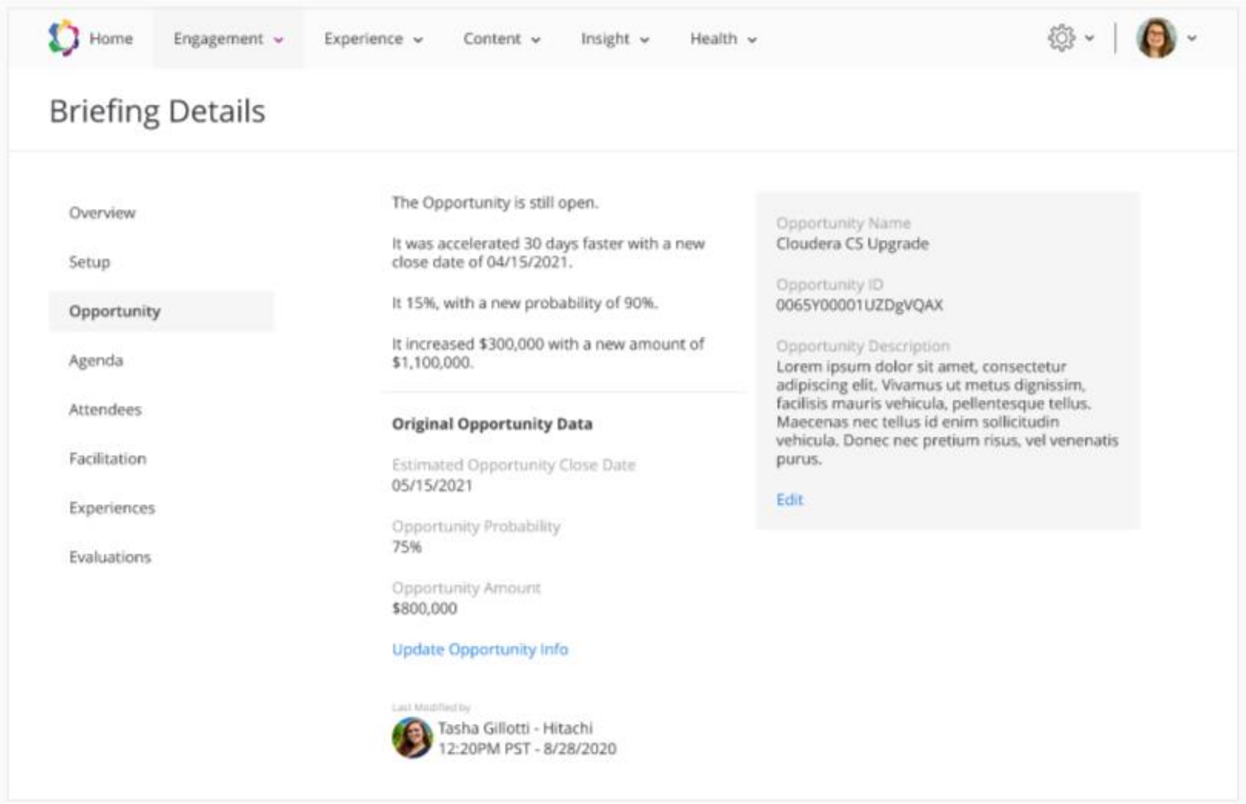


Figure 31. Open Opportunity

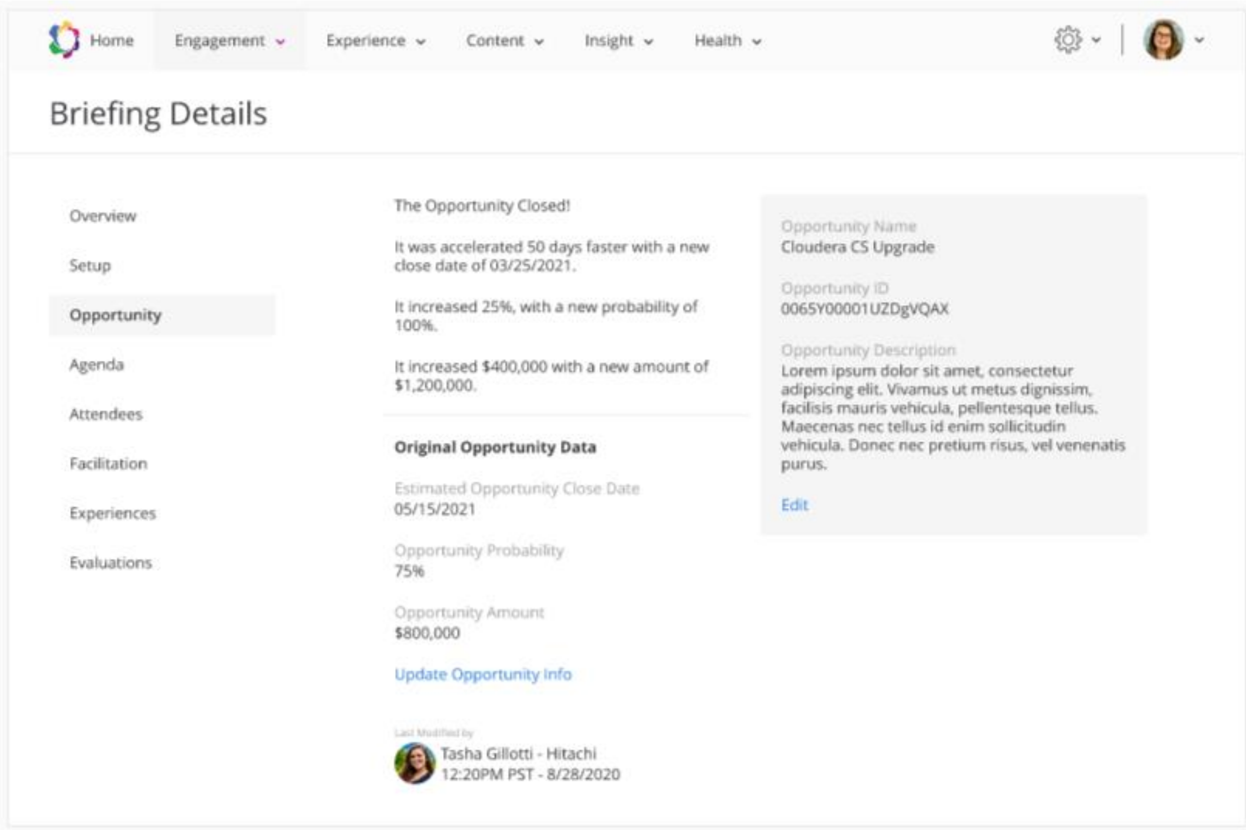


Figure 32. Closed Opportunity

UPDATE THE OPPORTUNITY DETAILS:

Clicking on the "Edit" button located at the bottom of the section with gray background user can update the information related to the opportunity details.

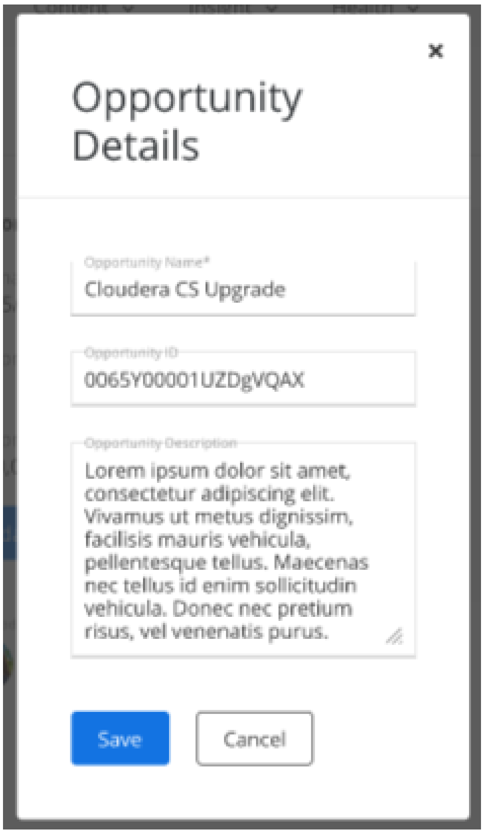


Figure 33. Opportunity Details modal window

Opportunity Name

- User can change the opportunity name
- In case that information was not indicated in Customer Briefing Request form user sees the “N/A” in that field

Opportunity ID

- User can change the opportunity ID
- In case that information was not indicated in Customer Briefing Request form user sees the “N/A” in that field

Opportunity Description

- User can change or remove the opportunity description
- In case that information was not indicated in Customer Briefing Request form user sees the “N/A” in that field

After clicked on the “Save” button user will see the updated information about Opportunity Description.

BRIEFING WITHOUT OPPORTYNITY

If the briefing was either converted from the Customer Briefing Request without opportunity information of created from scratch and user has an information about opportunity for that briefing, they can fill in an empty Opportunity form to track the information about planned deal.

Field	Data
Opportunity Name	1. Required 2. Freeform text field 3. Max length: 250 characters 4. Error message: Opportunity Name is required
Opportunity ID	1. Optional 2. Freeform text field 3. Max length: 18 characters
Opportunity Amount	1. Required 2. Empty field shows without '$' symbol 3. Add the '$' symbol at the beginning of the field after the user filled in some information 4. When the user editing that filed - hide the '$' symbol 5. Separate the classes and digits with commas ($1,234,567) 6. Separate decimal values with a dot ($1,234,567.89) 7. Max length - 50 symbols 8. Max length after dot - two symbols 9. Only numbers 10. Error message: Opportunity Amount is required
Opportunity Probability	1. Required 2. Empty field shows without '%' symbol 3. Add the '%' symbol at the end of the field after the user filled in some information 4. When the user editing that filed - hide the '%' symbol 5. Only numbers 6. Max length - 6 symbols 7. Max value is 100% 8. Max length after dot - two symbols 9. Separate decimal values with a dot (45.5% or 35.75%) 10. Error message: Opportunity Probability is required

Estimated Opportunity Close Date	1. Required 2. Date picker 3. User cannot select date lower than Briefing Day 4. Date picker time zone according to the time zone for the center in which the briefing takes place 5. Error message: Estimated Opportunity Close Date is required
Opportunity Description	1. Optional 2. Freeform text field 3. Max length: 2000 characters

7.1.6. ATTENDEES MANAGEMEN

On the Attendees page internal attendee (Briefing Manager who created a briefing) should be displayed by default.

For each attendee in the table system generates a unique CE App Access Link. So, user can manually copy this link and send it to the attendee using other resources.

INVITE STATUS

This is a new column "Invite Status" in the Attendees page where user can track the actual status for "Meeting Invite" email.

Invite Status	
Not Send	the default status before we send "Meeting Invite" or "Send CE App Access"
Sent	we already sent "Meeting Invite" or "Send CE App Access" and an attendee does not confirm or reject briefing invitation
Accepted	Attendee accepted the briefing invitation
Declined	Attendee rejected the briefing invitation
Tentative	Attendee selected the following options: - Tentative - Tentative and propose new time - Decline and propose new time
No email entered	show this status if attendee created without email
Not Sent	Should be shown if any other unexpected issues happened (e.g. problem with mailbox)

User sees the same "Invite Status" column on the "Send Meeting Invite" page. In both places (Attendees and "Send Meeting Invite" pages) invite status will be the same.

CREATE A NEW ATTENDEE

User can create a new attendee by clicking on 'Add Attendee' button.

Field	Data
Attendee Type	1. Required 2. Drop-down with the options – Internal and External 3. Error message: Attendee Type is required
Attendee First Name	1. Required 2. Freeform text field 3. Max length: 100 characters 4. Error: Attendee First Name is required
Attendee Last Name	1. Required 2. Freeform text field 3. Max length: 100 characters 4. Error: Attendee Last Name is required
Attendee Title	1. Optional 2. Freeform text field 3. Max length: 250 characters
Attendee Email	ATTENDEE TYPE - INTERNAL 1. Required 2. Freeform text field 3. Max length: 250 characters 4. Error message: Email is required 5. Email address should be unique ATTENDEE TYPE – EXTERNAL 1. Optional 2. Freeform text field 3. Max length: 250 characters 4. Email address should be unique

User can edit attendee details by clicking some attendee name on the list. After that user navigates to 'Attendee Details' page on edit mode.

On the 'Attendees Details' page user can delete selected attendee by clicking on 'Delete' link.

7.1.7. SEND 'MEETING/CALENDAR INVITE' EMAIL

To make that user should return to the Briefing Overview page and click on **'Send Meeting Invite**' text link**.**

In the 'Send Meeting Invites' screen user will the list with internal/external attendees from the Attendees tab and speakers. Speakers will be automatically added to that list from the Agenda page.

If an attendee does not have an email, they are still will be shown in the list but without a possibility to send them an email. Under the name, there will be "No Email" text. The user will not be able to click on them.

The new "Status" column is added to see if the invitation was already sent to the attendee or not.

There are possible "Status" conditions:

Invite Status	
Not Send	the default status before we send "Meeting Invite" or "Send CE App Access"
Sent	we already sent "Meeting Invite" or "Send CE App Access" and an attendee does not confirm or reject briefing invitation
Accepted	Attendee accepted the briefing invitation
Declined	Attendee rejected the briefing invitation
Tentative	Attendee selected the following options: - Tentative - Tentative and propose new time - Decline and propose new time
No email entered	show this status if attendee created without email
Not Sent	Should be shown if any other unexpected issues happened (e.g. problem with mailbox)

User can send Meeting Invite email unlimited number of times even though email status is "Sent".

EMAIL PREVIEW

By clicking on the 'Next' button user moves to the screen with the email body.

User should see a new WYSIWYG editor with "Components" drop-down where user can select variables related to that email.

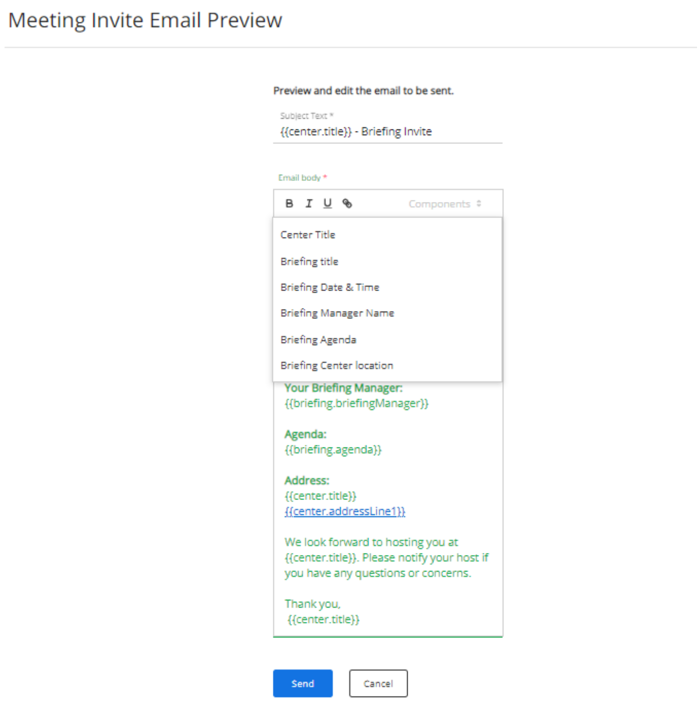
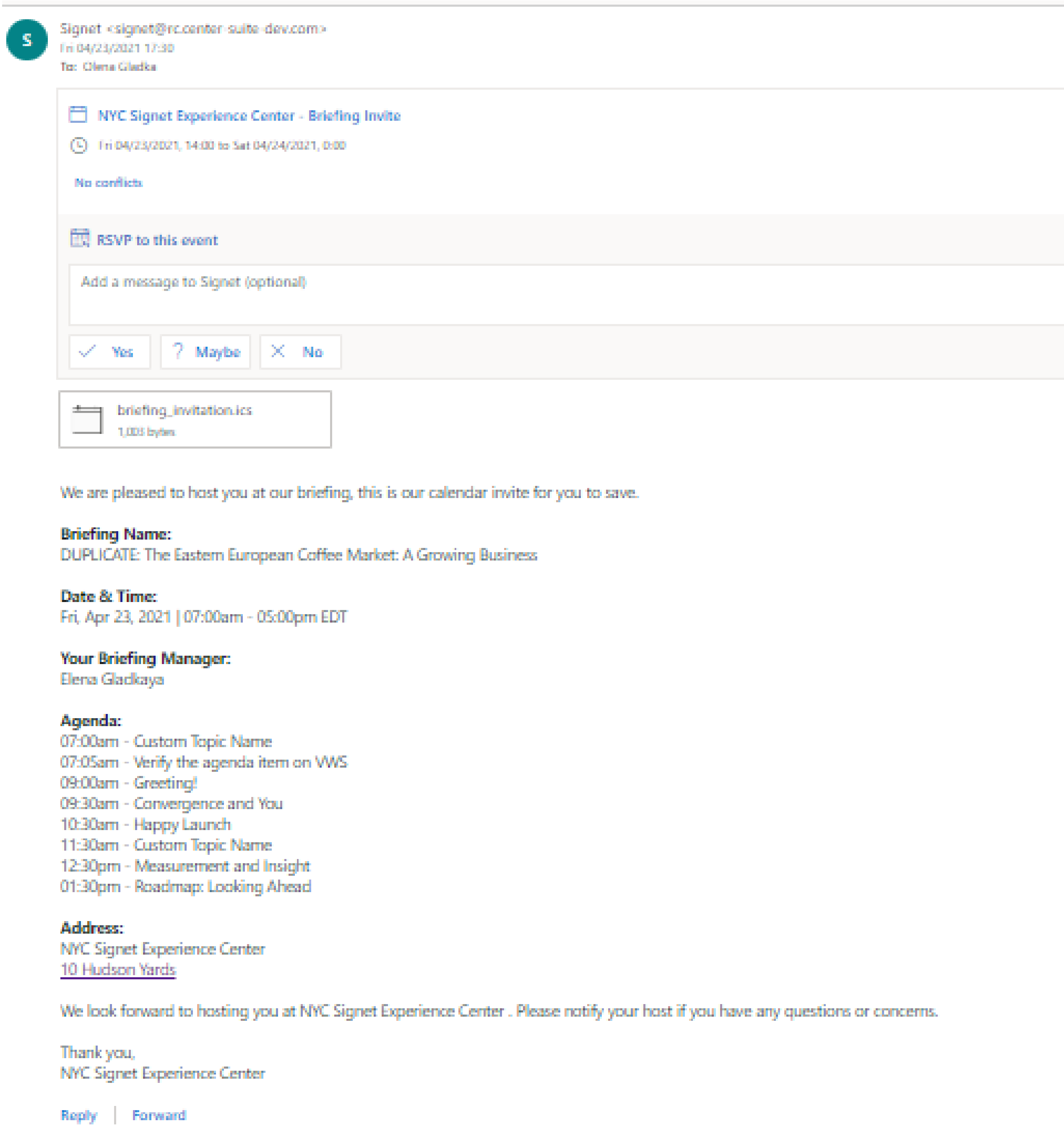


Figure 34. "Send Meeting Invite" email preview

The "Subject Text" and "Email Body" are editable. The changes in the email preview will not affect the email template.

By clicking 'Send' button on the 'Send Email' form, emails will be forwarded to selected attendees.


S

Signet <signet@rc.center-suite-dev.com>
Fri 04/23/2021 17:30
To: Olena Gladka

NYC Signet Experience Center - Briefing Invite
Fri 04/23/2021, 14:00 to Sat 04/24/2021, 0:00

No conflicts

RSVP to this event

Add a message to Signet (optional)

Yes | Maybe | No

briefing_invitation.ics
1,003 bytes

We are pleased to host you at our briefing, this is our calendar invite for you to save.

Briefing Name:
DUPLICATE: The Eastern European Coffee Market: A Growing Business

Date & Time:
Fri, Apr 23, 2021 | 07:00am - 05:00pm EDT

Your Briefing Manager:
Elena Gladkaya

Agenda:
07:00am - Custom Topic Name
07:05am - Verify the agenda item on VWS
09:00am - Greeting!
09:30am - Convergence and You
10:30am - Happy Launch
11:30am - Custom Topic Name
12:30pm - Measurement and Insight
01:30pm - Roadmap: Looking Ahead

Address:
NYC Signet Experience Center
10 Hudson Yards

We look forward to hosting you at NYC Signet Experience Center . Please notify your host if you have any questions or concerns.

Thank you,
NYC Signet Experience Center

Reply | Forward

Figure 35. Send Meeting Invite for In-Person briefing

Signet <signet@rc.center-suite-dev.com>
Fri 04/23/2021 17:32
To: Olena Gladka

NYC Signet Experience Center - Briefing Invite

Fri 04/23/2021, 14:00 to Sat 04/24/2021, 0:00

No conflicts

No response required

briefing_invitation.ics
1,003 bytes

We are pleased to host you at our briefing, this is our calendar invite for you to save.

Briefing Name:
DUPLICATE: The Eastern European Coffee Market: A Growing Business

Date & Time:
Fri, Apr 23, 2021 | 07:00am - 05:00pm EDT

Your Briefing Manager:
Elena Gladkaya

Agenda:
07:00am - Custom Topic Name
07:05am - Verify the agenda item on VWS
09:00am - Greeting!
09:30am - Convergence and You
10:30am - Happy Launch
11:30am - Custom Topic Name
12:30pm - Measurement and Insight
01:30pm - Roadmap: Looking Ahead

Video Conference Information:
Meeting URL: https://colorscheme.ru/

ColorScheme.Ru — Цветовой круг он-лайн: Подбор цветов и генерация цветовых схем

Комплементарная (контрастная) модель. Основной цвет дополнен его комплементом (цвета на противоположной стороне цветового круга).Создается один холодный и один теплый цвет — вы должны рассмотреть, какой из них ...

colorscheme.ru

Meeting ID: N/A
Meeting Password: N/A
Meeting Phone Number: N/A

We look forward to hosting you at NYC Signet Experience Center . Please notify your host if you have any questions or concerns.

Thank you,
NYC Signet Experience Center

Figure 36. Meeting invite for Virtual briefing

7.1.8. SEND 'CE APP ACCESS LINK' EMAIL

After creation of attendees' list, the next step is to inform them. To make that user should return to the Briefing Overview page and click on **'Share CE App Access Link'.** Then user will navigate to the 'Send Email' screen.

User may select all attendees' records by one click on the checkbox located on the table header.

If an attendee does not have an email, they are still will be shown in the list but without a possibility to send them an email. Under the name, there will be "No Email" text. The user will not be able to click on them.

The new "Status" column is added to see if the invitation was already sent to the attendee or not.

There are to possible "Status" conditions:

- **"Not Sent"** - the default value. Showing that the user has not sent an email to that attendee/speaker yet.
- **"Sent"** - Showing that the user has already sent an email to that attendee/ speaker.

User can send Meeting Invite email unlimited number of times even though email status is "Sent".

EMAIL PREVIEW

By clicking on the 'Next' button user moves to the screen with the email body.

User should see a new WYSIWYG editor with "Components" drop-down where user can select variables related to that email.

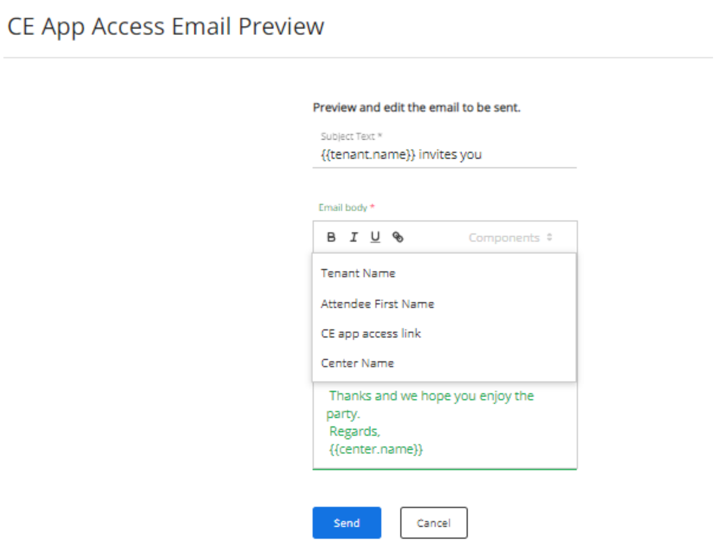


Figure 37. "CE App Access Link" email preview

The “Subject Text” and “Email Body” are editable. The changes in the email preview will not affect the email template.

By clicking ‘Send’ button on the ‘Send Email’ form, emails will be forwarded to selected attendees.

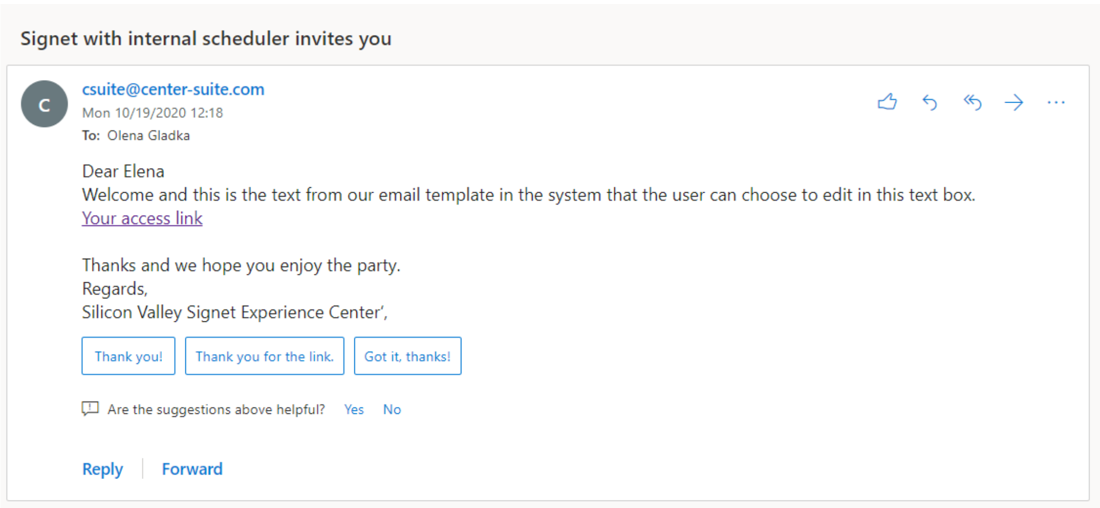


Figure 38. "CE App Access Link" email

7.1.9. PRINT ATTENDEE SEAT TENTS/PRINT AGENDA SHEETS

Based on the settings that were specified in Printables menu the user can print agenda sheets and/or attendee seat tents.

Clicking either on the “Print Agenda” or “Print Attendees Seat Tents” user will open a new print menu where they can see predefined document.

7.1.10. GENERAL CUSTOMER PORTAL ACCESS LINK/QR CODE

User is able to select from the two options how their will share the General access link to the Customer Portal to the attendees.

COPY SHARABLE LINK

Clicking on the "Copy Sharable Link" text link user copies the General access link to the Customer Portal.

QR CODE

For each briefing the system generate a QR code with the General access link to the Customer Portal.

Figure 39. QR code

Use can copy the QR code and send it with a separate email (Outlook/Gmail). Also, user can download a QR code as an image and upload it into the Platform (e.g. additional media for Virtual Warmer, footer logo for Signet Player etc.)

NEW CUSTOMER PORTAL ACCESS FLOW

Upon accessing the General Access link, the attendee will arrive at the Attendee List page.

1. If the attendee sees their name on the list, they can select their name. It will navigate the attendee to a new page where it will display their name and an email field (the email field will be pre-populated if their email is saved in the platform, otherwise it is empty).

The attendee can update the pre-populated email if it was wrong before (the platform will save the updated email) or enter their email if the field was empty and then hit the enter button. This takes them directly into the Customer Portal – Home page.

If the registered user enters a different email, it will send an email to the Briefing Manager.

2. If the attendee does not see their name on the list, they can click on the 'Add Me to Briefing' button. It will navigate the attendee to a new page where they can enter their name and email, then hit the enter button. This takes them directly into the Customer Portal – Home page.

In this scenario, the Briefing Manager will receive an email notifying them that an attendee previously not on the list is accessing the CE App. The Briefing Manager can review their information and revoke that attendee's access if they choose to.

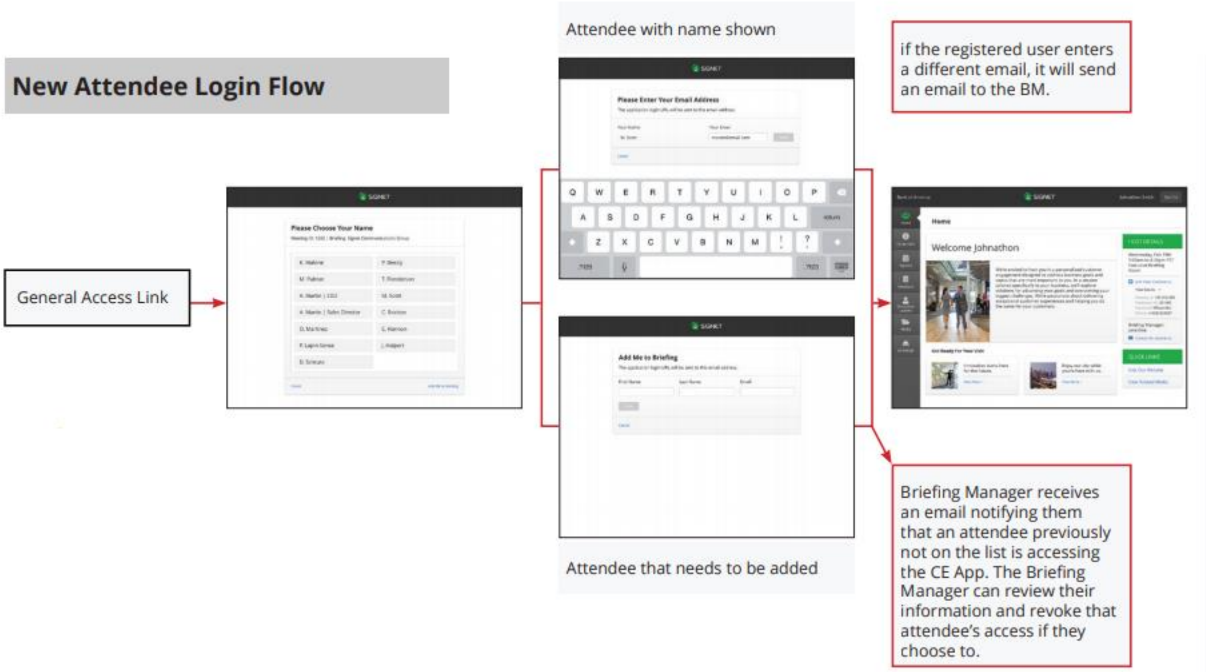


Figure 40. General Access flow

7.1.11. FACILITATION

The main of the Facilitation page is to create a Video Conference Link for virtual briefing.

Also, inside the Facilitation page user can indicate information about additional time zone for that briefing.

After adding the additional time zone, it will appear on the VW and inside the CE App. Inside the CE App the additional time zone will appear on the:

- Home page showing Current and Next Agenda Items
- Home page Host Details
- Agenda page
- Speaker Details page if Speaker is presenting an agenda
- Secondary time zone will display normally in Host Details.

VIDEO CONFERENCE INFORMATION

User can share video conference link with other attendees in CE Client App by turning on 'Enable Video Conference' toggle.

Field	Data
Enable Video Conference	1. Toggle with YES/NO options - toggle is ON (Yes) is set by default - toggle is OFF (No) video conference link will NOT be shared with other attendees in CE Client App.
Video Conference Provider Logo	1. Optional 2. Drop-down with a list of different meeting applications 3. The users will also have the option to show a generic video icon or to not show a logo.
Meeting URL	1. Required 2. Freeform text field 3. Max length: 250 characters 4. Error message: Meeting URL is required
Meeting ID	1. Optional 2. Freeform text field 3. Max length: 250 characters

Participant ID	1. Optional 2. Freeform text field 3. Max length: 250 characters
Meeting Password	. 1. Optional 2. Freeform text field 3. Max length: 250 characters
Meeting Phone Number	. 1. Optional 2. Freeform text field 3. Only numbers 4. Max length: 250 characters

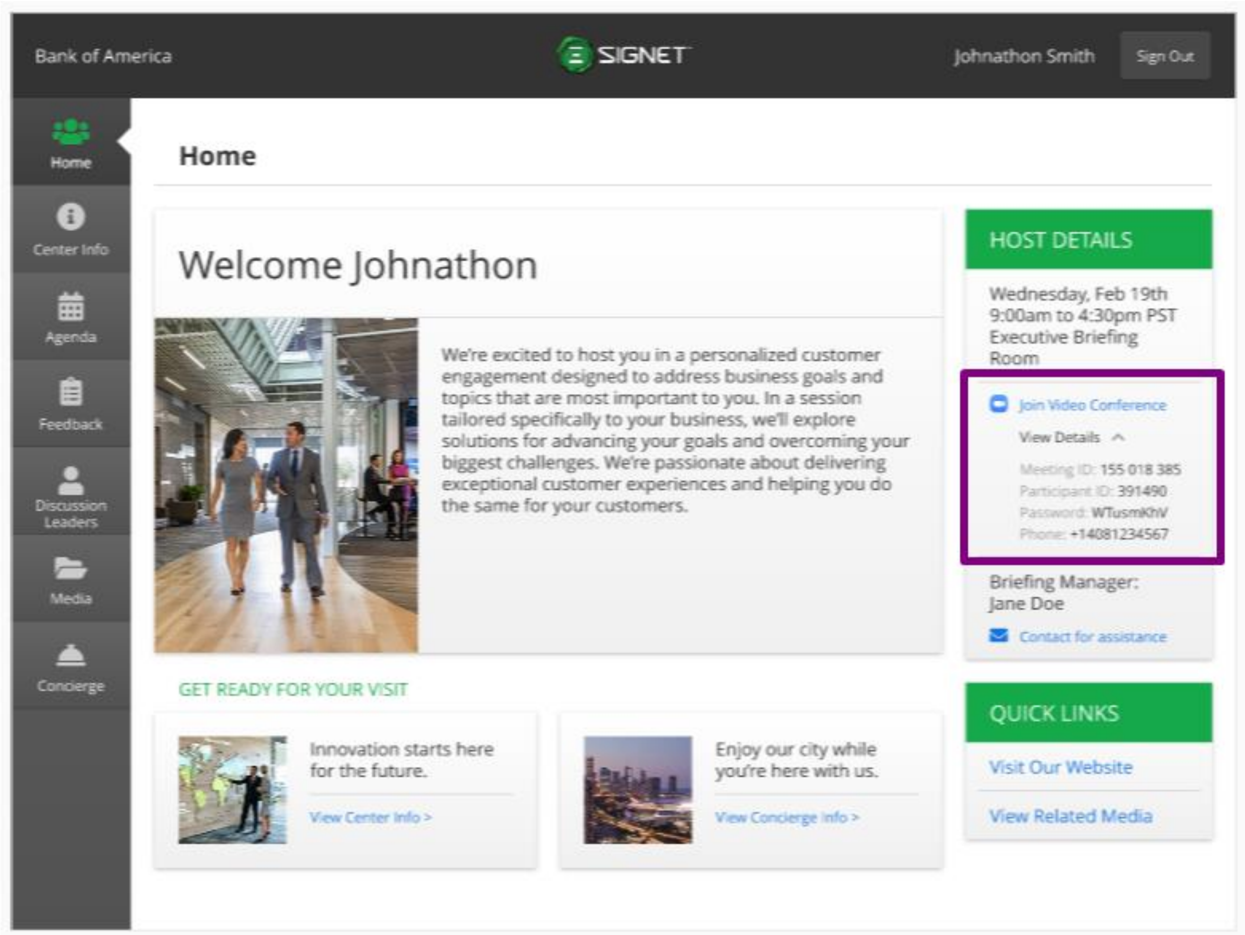


Figure 41. CE Client App - Virtual Briefing

ADDITIONAL TIME ZONE

Field	Data
Show Additional Time Zone	1. Toggle with YES/NO options - toggle is OFF (No) is set by default - toggle is ON (Yes), then the Additional Time Zone drop-down appears on the screen.
Additional Time Zone	1. Required 2. The drop - down consist of such time zones: • UTC - Universal Coordinated Time • ECT - European Central Time • EET - Eastern European Time • ART - (Arabic) Egypt Standard Time • EAT - Eastern African Time • MET - Middle East Time • NET - Near East Time • PLT - Pakistan Lahore Time • IST - India Standard Time • BST - Bangladesh Standard Time • VST - Vietnam Standard Time • CTT - China Taiwan Time • JST - Japan Standard Time • ACT - Australia Central Time • AET - Australia Eastern Time • SST - Solomon Standard Time • NST - New Zealand Standard Time • MIT - Midway Islands Time • HST - Hawaii Standard Time • AST - Alaska Standard Time • PST - Pacific Standard Time • PNT - Phoenix Standard Time • MST - Mountain Standard Time • CST - Central Standard Time • EST - Eastern Standard Time • PRT - Puerto Rico and US Virgin Islands Time • CNT - Canada Newfoundland Time • AGT - Argentina Standard Time

	• BET - Brazil Eastern Time • CAT - Central African Time 3. Error message: Additional Time Zone is required

Secondary time zone shall automatically calculate the difference between 'Briefing Time' and 'Additional Time Zone' and display it.

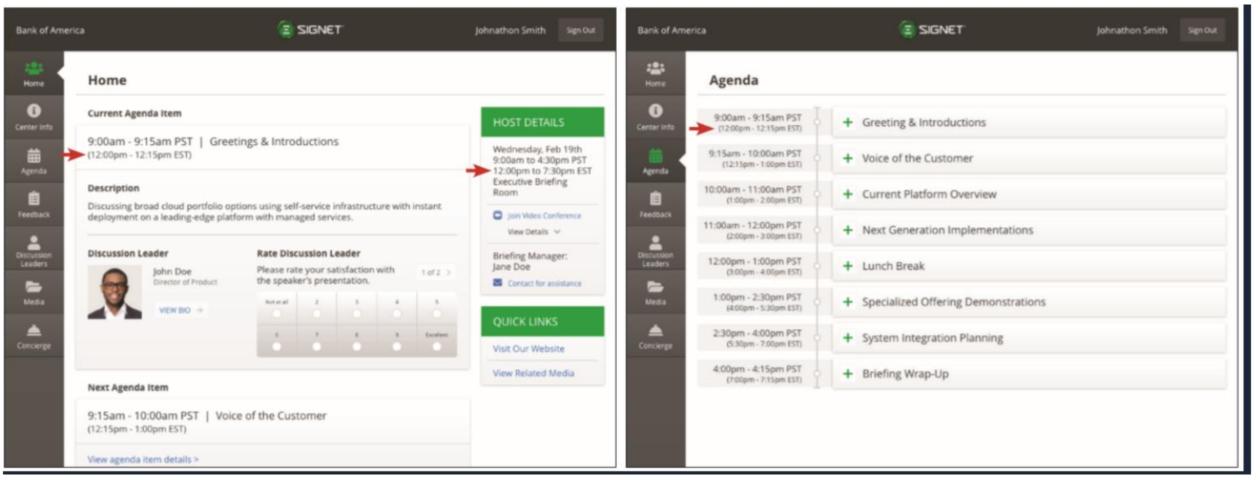


Figure 42. Additional Time Zone in CE App

Figure 43. Additional Time Zone in Virtual Welcome screen

7.1.12. EXPERIENCES

User can manage some functionality for CE Client App and Virtual Welcome screen per each briefing using Experiences tab.

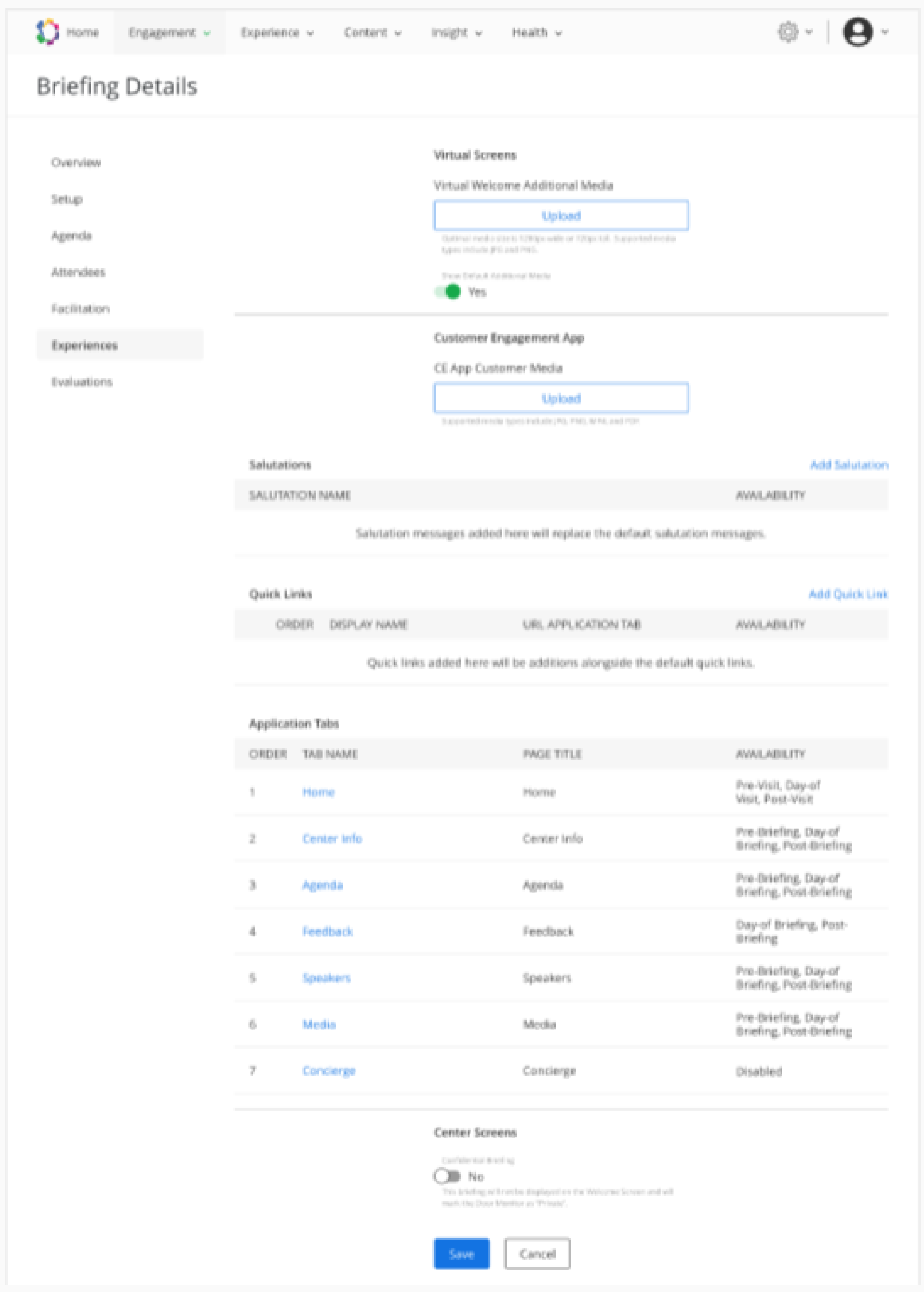


Figure 44. Experiences page

VIRTUAL WELCOME SCREEN

ADD MEDIA FROM THE CONTENT LIBRARY

User can select already uploaded media file (image/video) from the Content > Media menu by clicking on the 'Add Media' button.

User can use the general options to filter media files:

- filter media by type (only image)
- Users can find the needed media through existing media items in the Content Library tab with the help of the search field.

SELECT MEDIA FROM THE "CONTENT LIBRARY"

- User will see only media related to the Briefing Center
- The multiple media files selection is available. User should select the checkbox near desired media
- The user cannot add a media file that already presented in the table.
- The already added media will be shown as checked and inactive. The user cannot choose it again.

When the media file from the Content Library is added to the Settings page the "Product" field for the selected file can behave in the following ways:

- In case the Virtual Warmer product was already selected in the "Product" field on the Marketing page - nothing will be changed with this field.
- In case Virtual Warmer product was not added selected in the "Product" field on the Marketing page – when the user added media from the Content Library to the Media page this product will be added to that media in the Marketing page.

UPLOAD MEDIA DIRECTLY TO THE PAGE

The user can click on the "Upload" button to select a file from the device.

- Supported media types include JPG, JPEG, PNG
- Max size: 2 GB
- Only one file can be uploaded at a time

Once uploaded, the user will be able to complete the media fields with the following information:

Field	Data
Media	- required - will be filled with the uploaded media

Media Name	-required - freeform text field - max length: 500 symbols - Error: This field is required - Uploading file(name.file_extension) exists for the current client in database.
Media Short Description	-optional - freeform text field - max length: no restrictions except the technical constrains
Private - the private toggle will not affect any of the product **except the CE App**	-optional - “No” by the default - helper text: Private media will be disabled from being downloaded or emailed in the CE App.
Industry	- required - drop-down with the list industry created - All selected by the default - multiple selection is available - Error: This field is required
Center	- required - drop-down with the list of Centers the user has access to. - multiple selection is available - Error: This field is required
Product	- optional - drop-down with the list of available products but the default value will be the product for which we are uploading this media. This will value cannot be unchecked. The user can add more products. - multiple selection is available - If the center name exceeds the dropdown width, it will ellipsis and not wrap to the next line. - this dropdown is sorted by product name alphabetically, then center name secondarily.

Clicking on the **'Save'** button user will add the uploaded media to the Additional Media section and to the Content - Marketing page.

The "Product" field for the uploaded media will be updated with the selected products: Virtual Warmer and with other products if the user will choose it while uploading the media.

CUSTOMER PORTAL CLIENT APPLICATION

ADD MEDIA FROM THE CONTENT LIBRARY

User can select already uploaded media file (image/video) from the Content > Media menu by clicking on the 'Add Media' button.

User can use the general options to filter media files:

1. filter media by type (image/video/PDF)
2. Users can find the needed media through existing media items in the Content Library tab with the help of the search field.

SELECT MEDIA FROM THE "CONTENT LIBRARY"

- User will see only media related to the Center they have access to (the center for media item is indicated during media creation in the 'Center Access' field)
- The multiple media files selection is available. User should select the checkbox near desired media
- The user cannot add a media file that already presented in the table.
- The already added media will be shown as checked and inactive. The user cannot choose it again.

When the media file from the Content Library is added to the Media page the "Product" field for the selected file can behave in the following ways:

- In case the Customer Portal product was already selected in the "Product" field on the Marketing page - nothing will be changed with this field.
- In case Customer Portal product was not added selected in the "Product" field on the Marketing page – when the user added media from the Content Library to the Media page this product will be added to that media in the Marketing page.

UPLOAD MEDIA DIRECTLY TO THE WELCOME SCREEN

The user can upload a completely new media to the Media table.

The user can click on the "Upload" button to select a file from the device.

- Supported media types include JPG, JPEG, PNG, MP4 and PDF

- Max size: 2 GB
- Only one file can be uploaded at a time

Once uploaded, the user will be able to complete the media fields with the following information:

Field	Data
Media	- required - will be filled with the uploaded media
Media Name	-required - freeform text field - max length: 500 symbols - Error: This field is required - Uploading file(name.file_extension) exists for the current client in database.
Media Short Description	-optional - freeform text field - max length: no restrictions except the technical constrains
Private	-optional - "No" by the default - helper text: Private media will be disabled from being downloaded or emailed in the CE App.
Industry	- required - drop-down with the list industry created - All selected by the default - multiple selection is available - Error: This field is required
Center	- required - drop-down with the list of Centers the user has access to. - multiple selection is available - Error: This field is required
Product	- optional - drop-down with the list of available products but the

	default value will be the product for which we are uploading this media. This will value cannot be unchecked. The user can add more products. - multiple selection is available - If the center name exceeds the dropdown width, it will ellipsis and not wrap to the next line. - this dropdown is sorted by product name alphabetically, then center name secondarily.

Clicking on the **'Save'** button user will add the uploaded media to the briefing and to the Content - Marketing page.

The "Product" field for the uploaded media will be updated with the selected products: Customer Portal and with other products if the user will choose it while uploading the media.

SALUTATIONS

User can create a specific salutation(s) related to the exact briefing. Salutations added on this screen will override any salutations that are configured on Experience > CE App > Messaging screen.

Salutations shall be shown in the Slider within CE App according to this sorting.

QUICK LINKS

User can create a separate list with quick link for each briefing. Quick Links added on this page will merge with quick links that are added on Experience > CE App > Settings screen.

APPLICATION TABS

On the same screen user can see a list with CE Client Application Tabs.

Application Tabs

ORDER	TAB NAME	PAGE TITLE	AVAILABILITY
1	Home	Home	Pre-Visit, Day-of Visit, Post-Visit
2	Center Info	Center Info	Pre-Briefing, Day-of Briefing, Post-Briefing
3	Agenda	Agenda	Pre-Briefing, Day-of Briefing, Post-Briefing
4	Feedback	Feedback	Day-of Briefing, Post-Briefing
5	Speakers	Speakers	Pre-Briefing, Day-of Briefing, Post-Briefing
6	Media	Media	Pre-Briefing, Day-of Briefing, Post-Briefing
7	Concierge	Concierge	Disabled

Figure 45. Application Tabs

The users can click into the Application Tab Details to set its availability. User can hide needed tab from CE Client App left navigation menu all unchecked 'Show in Briefing Instance' checkboxes. The data point in the Availability column will display "Disabled".

7.1.13. EVALUATIONS

We have redesigned the Evaluation page. Now on the "Evaluation" page user will see information that covered different aspects of the attendee's feedback.

The Evaluation page divided into two sections:

- General Engagement Feedback
- Agenda Topic Feedback

Both sections show the same information depending on the evaluation question level (briefing or agenda speaker):

Number of Responses - total number of all received answers depending on the question level (Briefing or Agenda Speaker)

- if there is no feedback related to the Briefing or Agenda Speaker then the user should see the N/A in front of the "Number of Responses"
- the system counts the responses from internal and external attendees
- count each response - the user can leave as many responses as they want

Comment Sentiment section - is the overall sentiment for the comment questions. The tallied total with the most is shown.

List with feedback questions related to the Briefing level with number of answers/avg rating or comment sentiment

List with feedback questions related to the Agenda level with number of answers/avg rating or comment sentiment. Each question related to the agenda topic and speaker

- On these sections, user should see only those questions which have at least one feedback
- For each question, user will see how many attendees answered, the average rating or the overall sentiment for this question depending on the question type.
- The ratings and comments can be expanded to show the ratings/feedback provided by each attendee.
- The ratings and comments can be expanded to show the ratings/feedback provided by each attendee.

FREEFORM TEXT EVALUATION QUESTION:

We using the **Amazon Comprehend** to determine the sentiment of attendee's feedback.

The system analysis only text feedbacks (freeform text evaluation question) and determines if the sentiment is positive, negative, neutral (mixed).

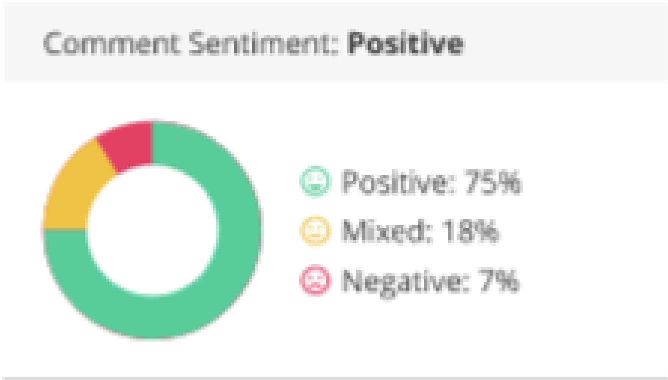
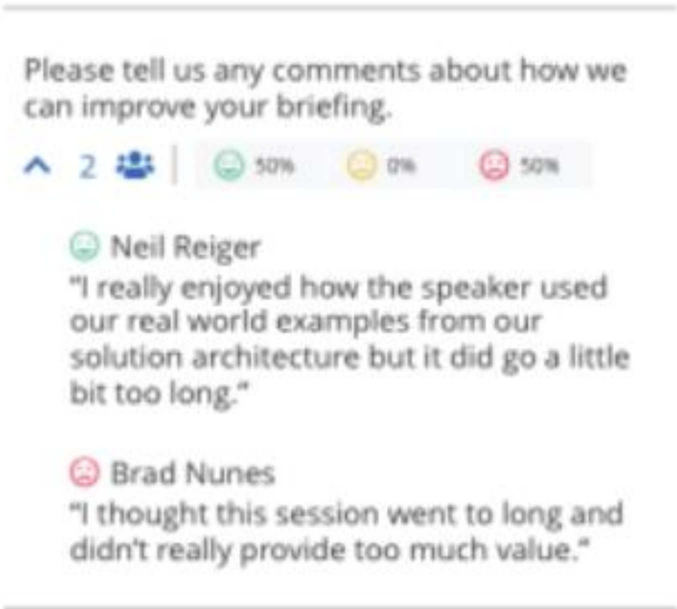


Figure 46. General comment sentiment based on the evaluation question level

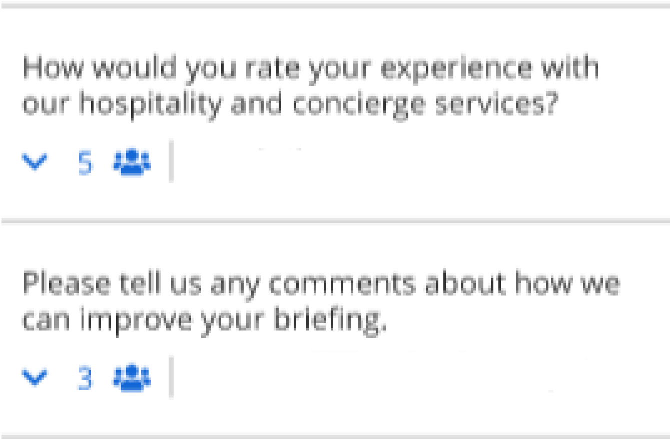
The sentiment analysis percentage shown under the question is a breakdown of how many of the answers overall from the attendees are positive, mixed/neutral, or negative.



RADIO SINGLE SELECTION EVALUATION QUESTION:

In case of evaluation question has numeric answer choices (e.g. 1, 2, 3 etc) on the Evaluation page user sees the average rating for the specific question.

In case of evaluation question has text answer choices (e.g. excellent, good, bad) on the Evaluation page user sees the total number of responses for the specific question.



And an additional option that is "Export". User can export full report with feedbacks clicking 'Export' button. Report will be exported in xlsx file format.

7.1.14. WRAP-UP (NEW FUNCTIONALITY)

On the briefing level, the user is able to leave notes when it has been ended.

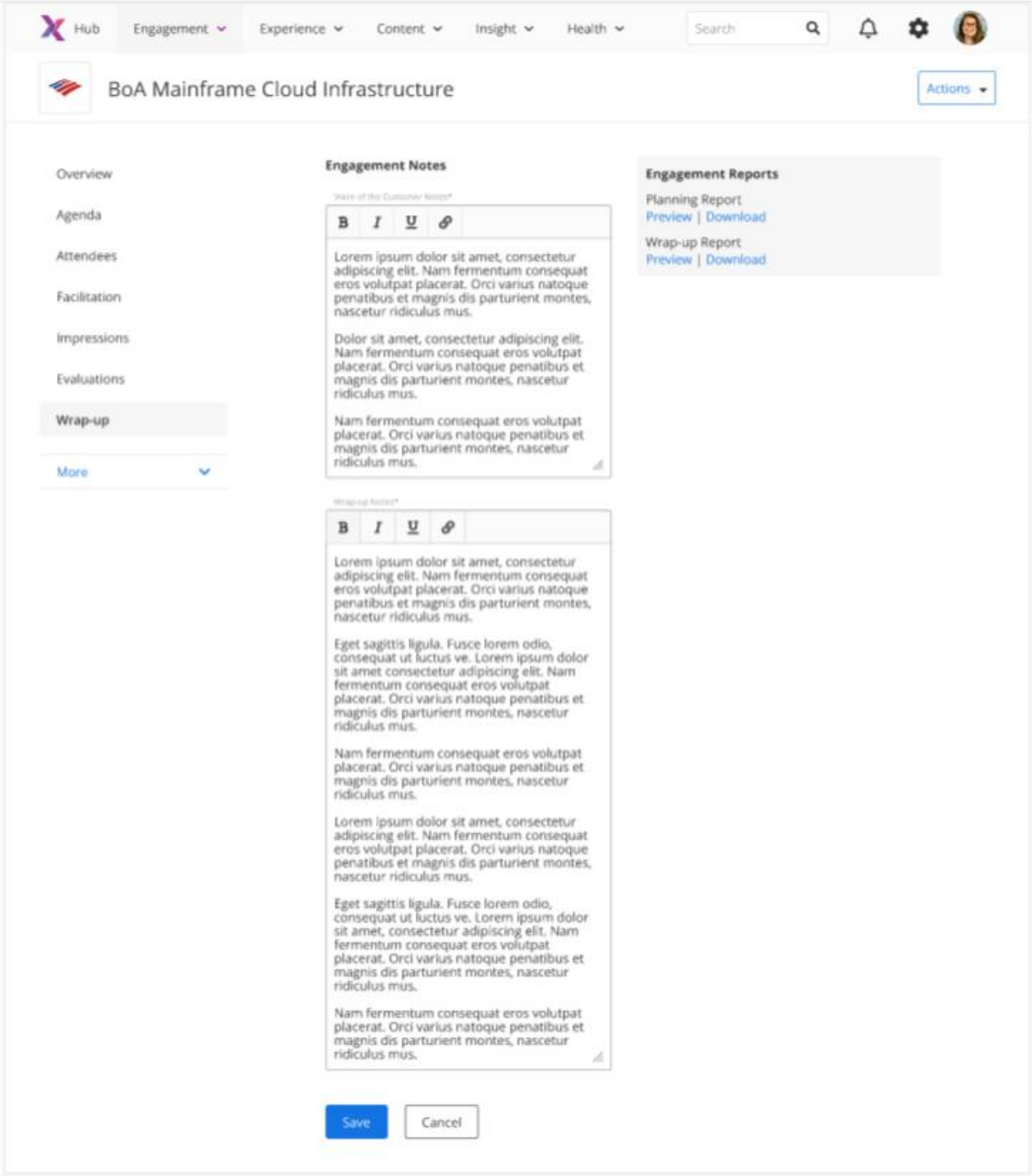


Figure 47. Wrap-Up notes

The second place where user can generate Planning and/or Wrap-Up reports.

Information filled in into the Wrap-Up page (Voice of the Customer Notes and/or Wrap-up Notes) will be added to the Wrap-Up report to separate sections.

7.1.15. RECORDINGS (NEW FUNCTIONALITY)

A new intelligence functionality in Nexus Hub is Briefing Video Recording. The Briefing Manager has a possibility to upload either audio or video file with briefing recording.

The Recordings page should be available for the briefings with all engagement types **except Test.**

The supported language of a media file is English, and the file name should be also writing in English.

User can upload only ONE file for each briefing even though the previously uploaded file was deleted.

Clicking on the "Add Recording" button user will navigate to the form where they can upload media file. The supported file types include FLAC, MP3, MP4, Ogg, WebM or WAV file format. The media file size should be less than 2 GB.

When the file added the "Start Processing" button activates, and user can start the process of file transcription (we use the AWS Transcribe).

Once the transcription process has been started the user will return to the Recordings main page where they can see the status of that record. The recording name is inactive.

When the file was transcribed the status changed to "Transcribed" and recording name is clickable. Clicking on the recording name user will navigate to the Recording Details.

In common with the possibility to transcribe an uploaded file the system also makes sentiment analysis of the recording.

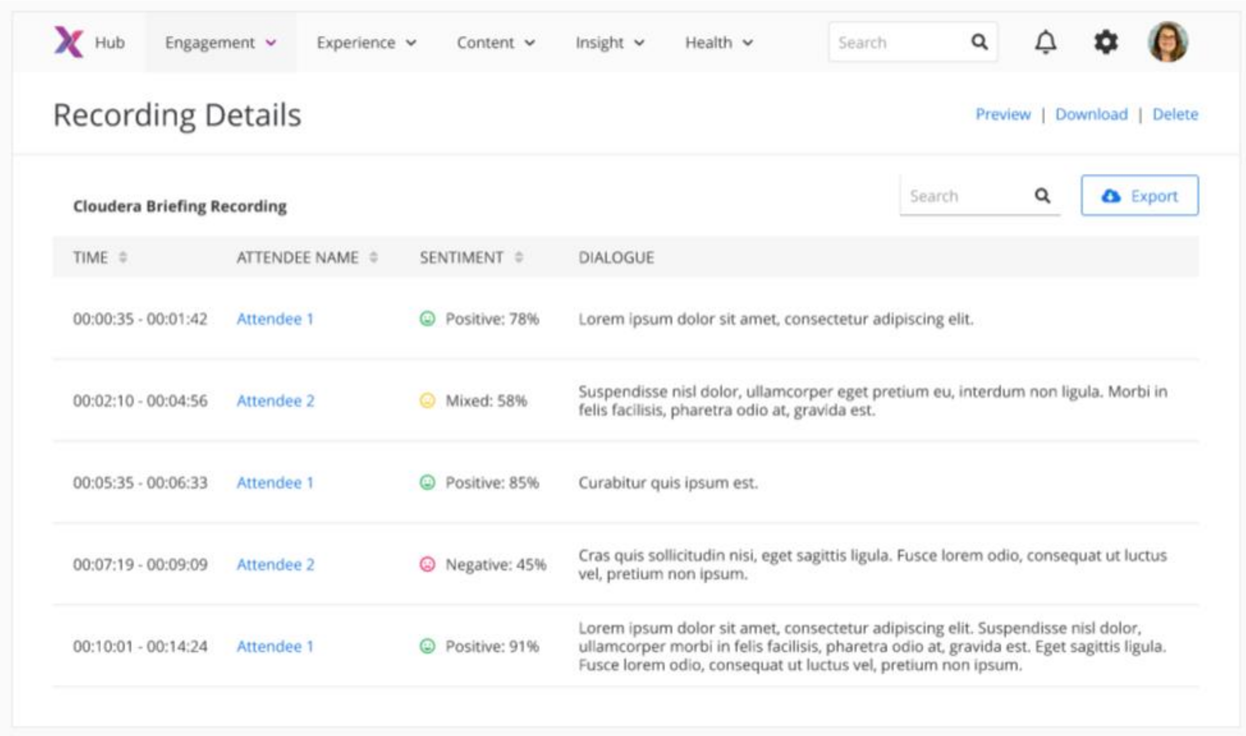


Figure 48. Recording Details Transcript

The system identified speakers like "speaker 1", "speaker 2" …. "speaker N" and user is able to rename each speaker.

Clicking on the Attendee Name user sees a modal window with the drop-down that contains list with attendees (include Speakers) for the selected briefing. Step by step by selecting attendee from the list a Briefing Manager can build the whole picture of that briefing.

After all attendees have been renamed user can export briefing recording and use this file for further analysis.

In case user delete a briefing recording file from their computer they have a possibility to download this file from the Recording Details page. Also, they can preview uploaded file to double-check some information.

7.1.16. IMPRESSIONS (NEW FUNCTIONALITY)

The Briefing Manager can see what media were viewed/emailed/downloaded for the throughout a specific briefing in the Customer Portal.

All this information will be available on the Impressions page.

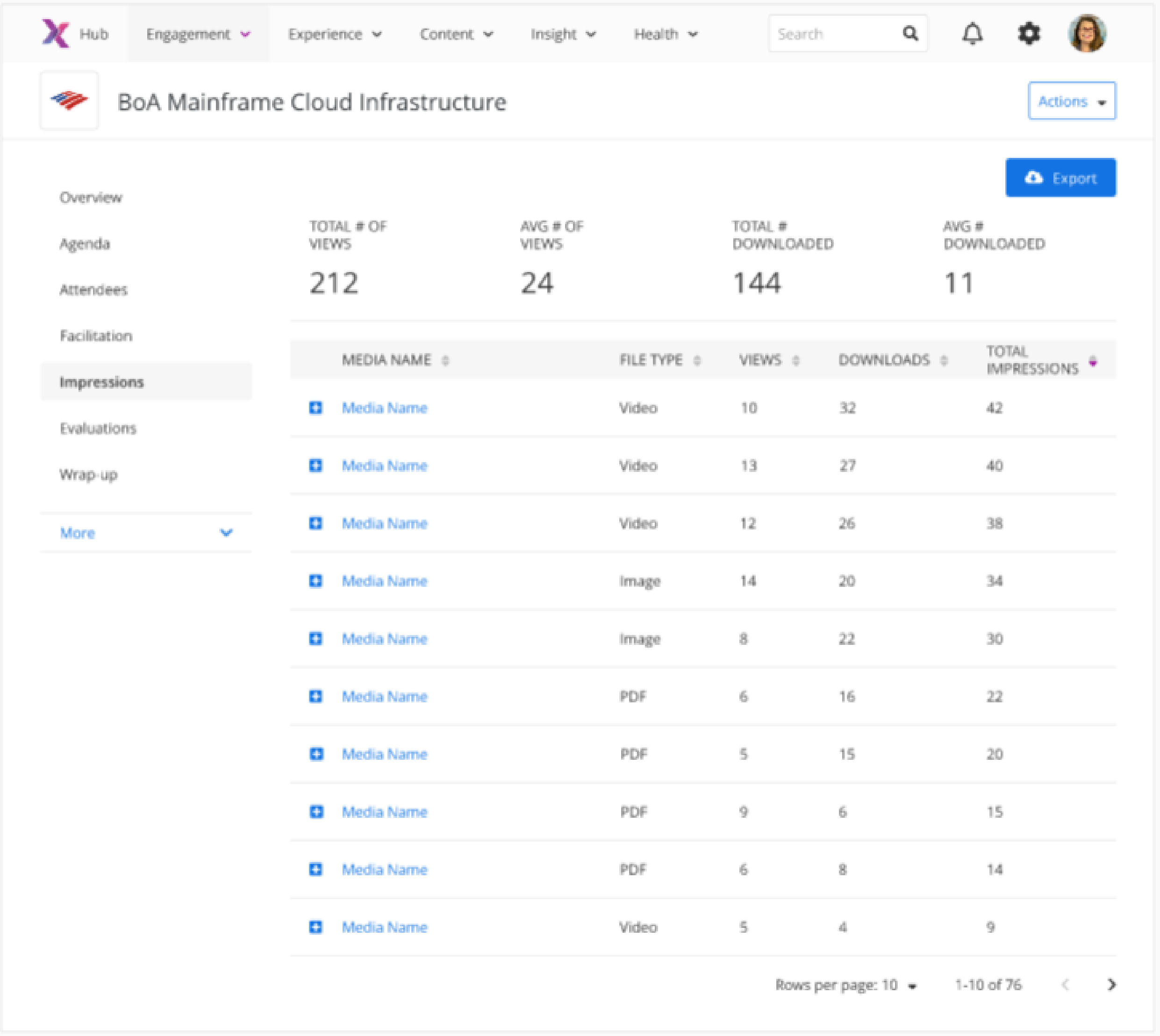


Figure 49. Briefing Impressions page

The user will see a list of media files that were viewed/emailed/downloaded by external attendees in the Customer Portal. By clicking on the "plus" button user can see the list of external attendees and their actions with that media.

This option will help a Briefing Manager and/or Briefing Coordinator analyses which media was viewed/emailed/downloaded the most.

SECTION 8: EXPERIENCE

8.1. CUSTOMER PORTAL – ADMIN TOOL

The other important part of our **CenterSuite Platform** is Customer Engagement Application – a tool that will revolutionize customer center experience.

8.1.1. CENTER INFO

The first tab on which user navigates from Experience – CE App is Center Info.

On that page (Center Info) user can see the same list with Centers with which they associated for.

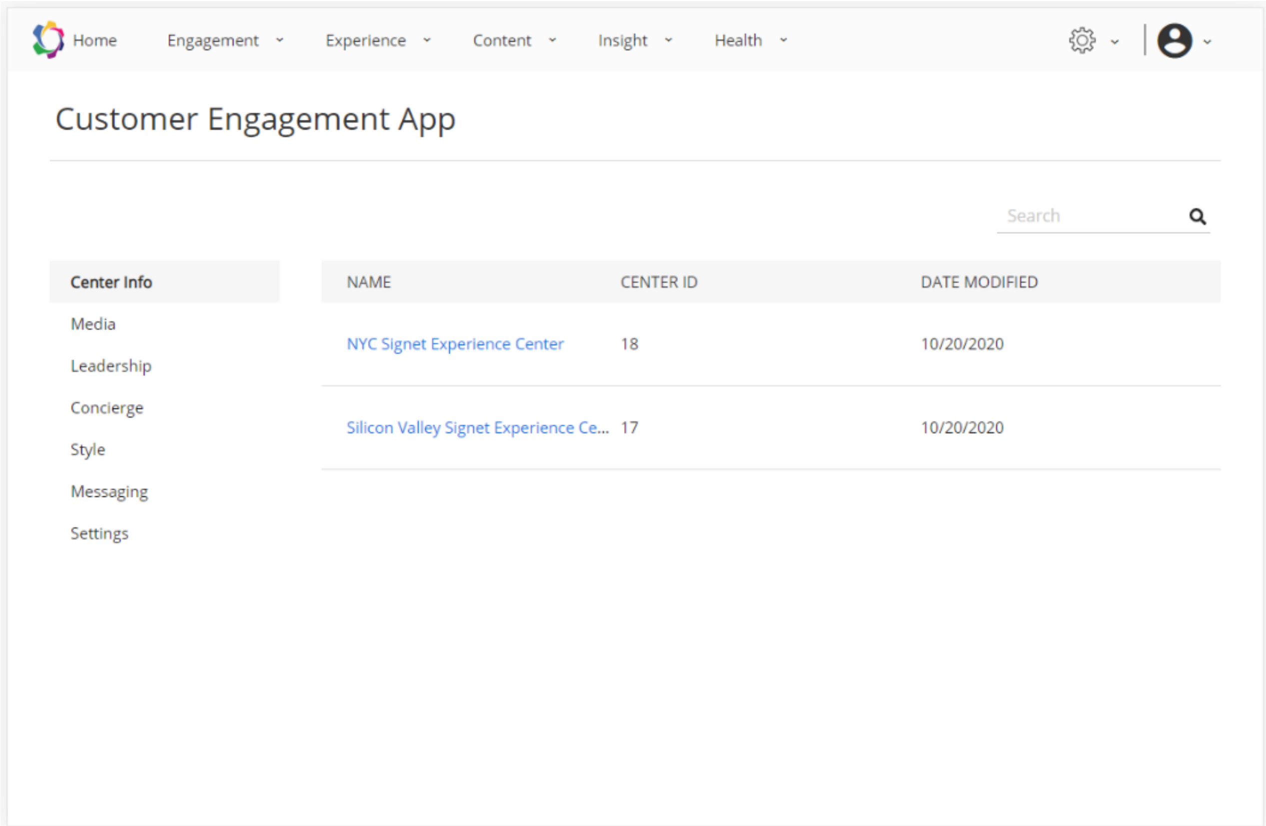


Figure 50. Center Info main page

Clicking on Center Name user follows to page with additional information related to the selected Center.

On center details page user can see the Leadership Team section with (or without) the members list initiated to this center.

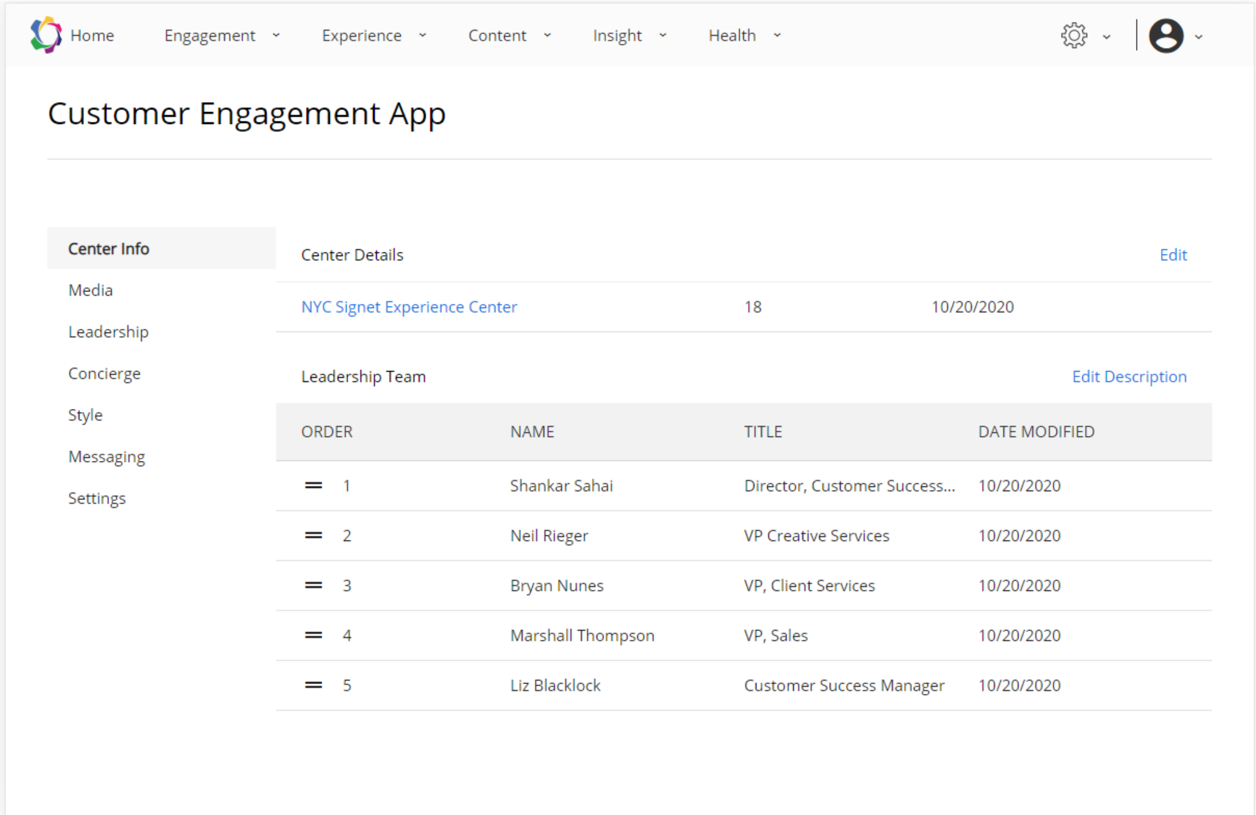


Figure 51. Center details page

EDIT CENTER DETAILS

User can edit center information which is displaying on CE Client App clicking on 'Edit' button or the name of center.

Field	Data
Center	1. Required 2. Freeform text field 3. Max length: 80 characters 4. Error message: Center is required
Website	1. Optional 2. Text field 3. Max length: 120 characters 4. Validation for the correct structure http or https://www.website.com
Center Info Short Description	1. Required 2. Text field 3. Max length: 250 characters 4. Error message: Center Short Description is required

Center Info Overview	1. Required 2. Text field 3. Max length: 500 characters 4. Error message: Center Infor Overview is required
Center Info Media	1. Required 2. File format: PNG, mp4, JPG, JPEG 3. Max file size: 5 GB 4.Multiple media uploading 5. Error message: Media is required
Center Info Thumbnail	1. Required 2. File format: PNG, JPG, JPEG 3. Max file size: 100 Mb 4. Error message: Center Thumbnail is required
Center Brochure	1. Optional 2. File format: PNG, JPG, JPEG 3. Max file size: 100 Mb

EDIT LEADERSHIP TEAM DESCRIPTION

User can also edit Leadership Team description which is displaying on CE Client App clicking on 'Edit Description' button.

Field	Data
Leadership Team Sort Description	1. Required 2. Text field 3. Max length: 500 4. Error message: "Leadership Team Description is required"
Leadership Team Thumbnail	1. Optional 2. File format: JPG, JPEG, PNG 3. Max file size: 100 Mb

All information provided here will be shown in CE Client App mostly on Center Info tab.

8.1.2. LEADERSHIP

On Leadership page user can provide leadership team members that will be shown in CE Client App.

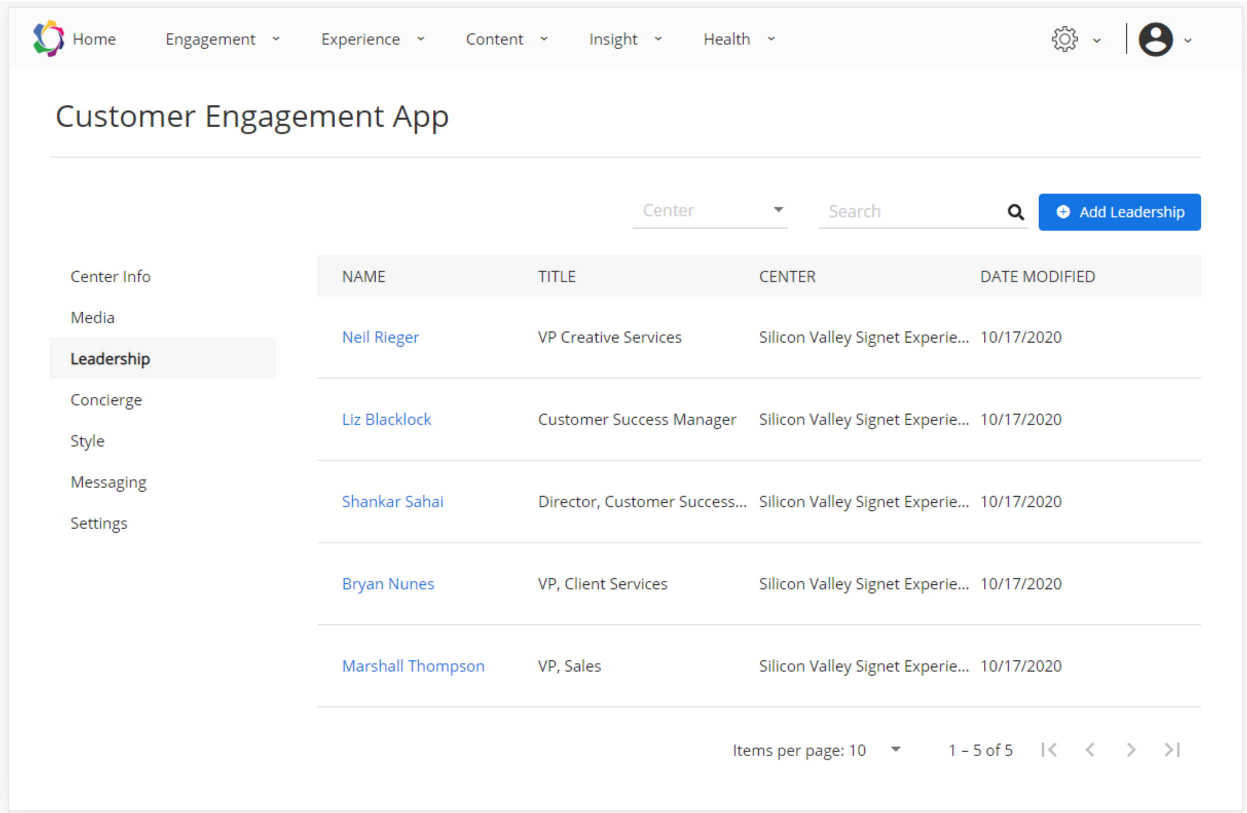


Figure 52. Leadership main page

CREATE A NEW LEADERSHIP TEAM MEMBER

User can create a new leadership team member clicking on 'Add Leadership' button.

Field	Data
Leadership Photo	1. Optional 2. Image upload button 3. Supported files: png, jpeg, jpg 4. Max file size: 50 MB
Leadership First Name	1. Required 2. Text field 3. Max length: 100 4. Error message: Leadership First Name is required
Leadership Last Name	1. Required 2. Text field

	3. Max length: 100 4. Error message: Leadership Last Name is required
Leadership Title	1. Required 2. Text field 3. Max length: 100 4. Error message: Speaker Title is required
Leadership Biography	1. Optional 2. Freeform text fields 3. Max length: 2500 characters
Center Access	1. Required 2. Dropdown with the list of available Centers 3. Multiple selection 4. 'ALL' option available only for user with the System Role - Admin 5. Error message: Center Access is required

Created team member associated with the Center should be automatically displayed on the Center Info screen in the Leadership section.

8.1.3. MEDIA

Click on the Media tab on the left Navigation menu to see previously uploaded and saved media files. The media files that were created on that page will be displayed inside Customer Portal – Media tab regarding the briefing account industry.

User has several options on how to create a media in that page.

ADD MEDIA FROM THE CONTENT LIBRARY

User can select already uploaded media file (image/video) from the Content > Media menu by clicking on the 'Add Media' button.

User can use the general options to filter media files:

3. filter media by type (image/video/PDF)
4. Users can find the needed media through existing media items in the Content Library tab with the help of the search field.

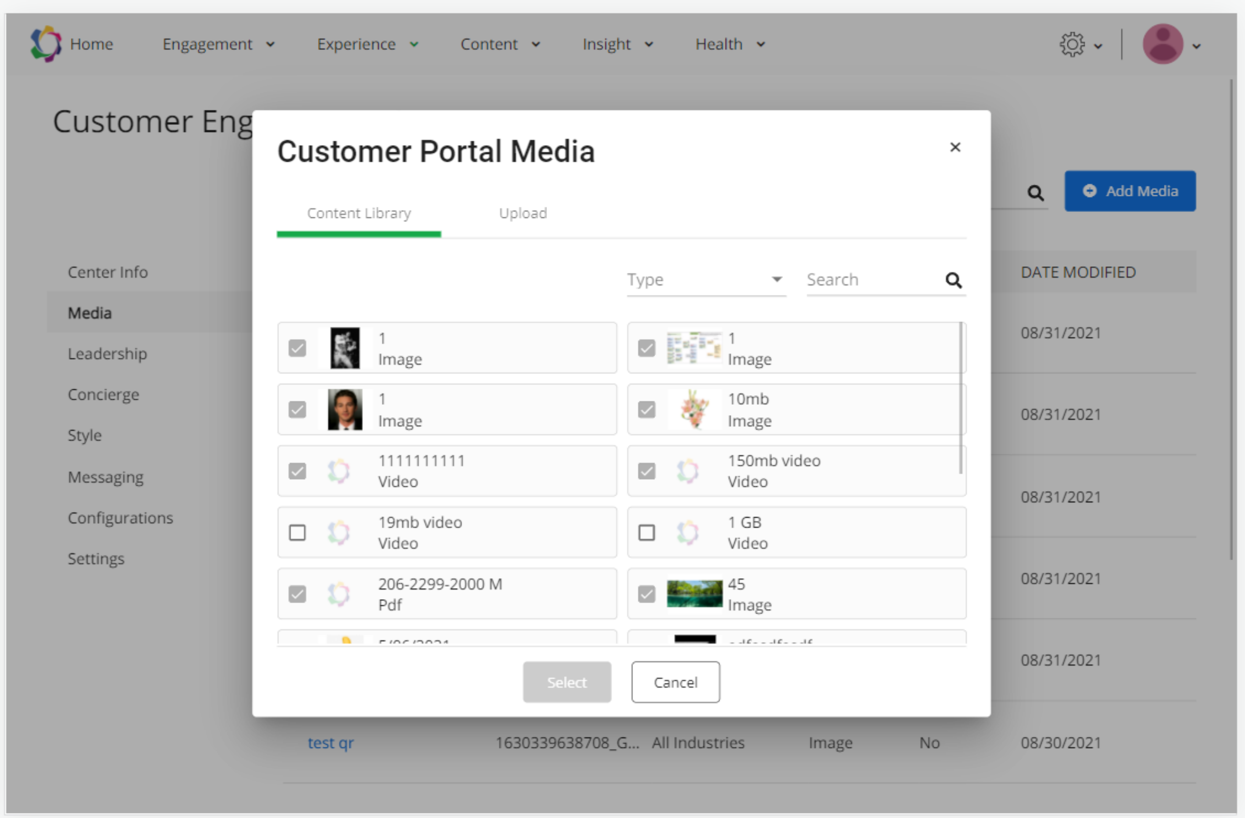


Figure 53. Add media from the Content Library menu

SELECT MEDIA FROM THE "CONTENT LIBRARY"

- User will see only media related to the Center they have access to (the center for media item is indicated during media creation in the 'Center Access' field)
- The multiple media files selection is available. User should select the checkbox near desired media
- The user cannot add a media file that already presented in the table.

- The already added media will be shown as checked and inactive. The user cannot choose it again.

When the media file from the Content Library is added to the Media page the "Product" field for the selected file can behave in the following ways:

- In case the Customer Portal product was already selected in the "Product" field on the Marketing page - nothing will be changed with this field.
- In case Customer Portal product was not added selected in the "Product" field on the Marketing page – when the user added media from the Content Library to the Media page this product will be added to that media in the Marketing page.

UPLOAD MEDIA DIRECTLY TO THE WELCOME SCREEN

The user can upload a completely new media to the Media table.

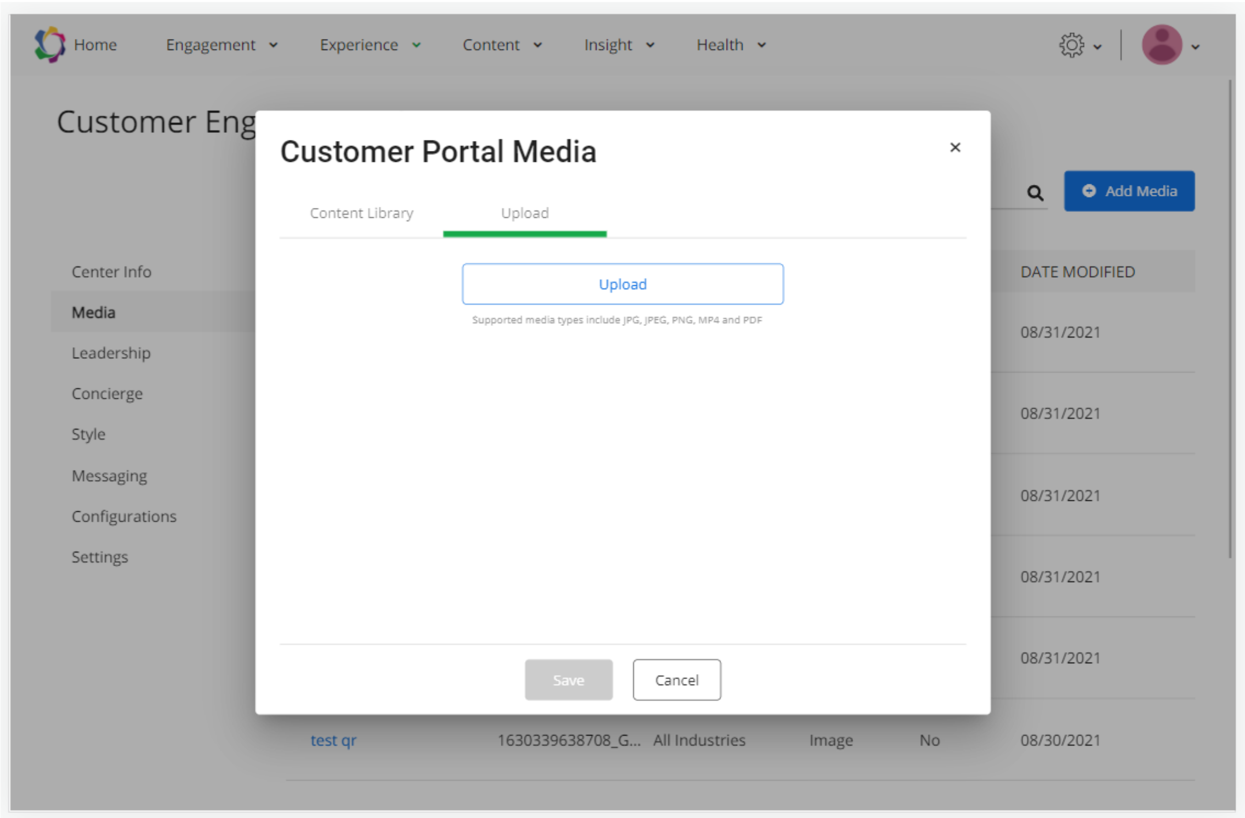


Figure 54. Direct media upload

The user can click on the "Upload" button to select a file from the device.

- Supported media types include JPG, JPEG, PNG, MP4 and PDF
- Max size: 2 GB
- Only one file can be uploaded at a time

Once uploaded, the user will be able to complete the media fields with the following information:

Field	Data
Media	- required - will be filled with the uploaded media
Media Name	-required - freeform text field - max length: 500 symbols - Error: This field is required - Uploading file(name.file_extension) exists for the current client in database.
Media Short Description	-optional - freeform text field - max length: no restrictions except the technical constrains
Private	-optional - "No" by the default - helper text: Private media will be disabled from being downloaded or emailed in the CE App.
Industry	- required - drop-down with the list industry created - All selected by the default - multiple selection is available - Error: This field is required
Center	- required - drop-down with the list of Centers the user has access to. - multiple selection is available - Error: This field is required
Product	- optional - drop-down with the list of available products but the default value will be the product for which we are uploading this media. This will value cannot be unchecked. The user can add more products. - multiple selection is available - If the center name exceeds the dropdown width, it

	will ellipsis and not wrap to the next line. - this dropdown is sorted by product name alphabetically, then center name secondarily.

Clicking on the **'Save'** button user will add the uploaded media to the Media table and to the Content - Marketing page.

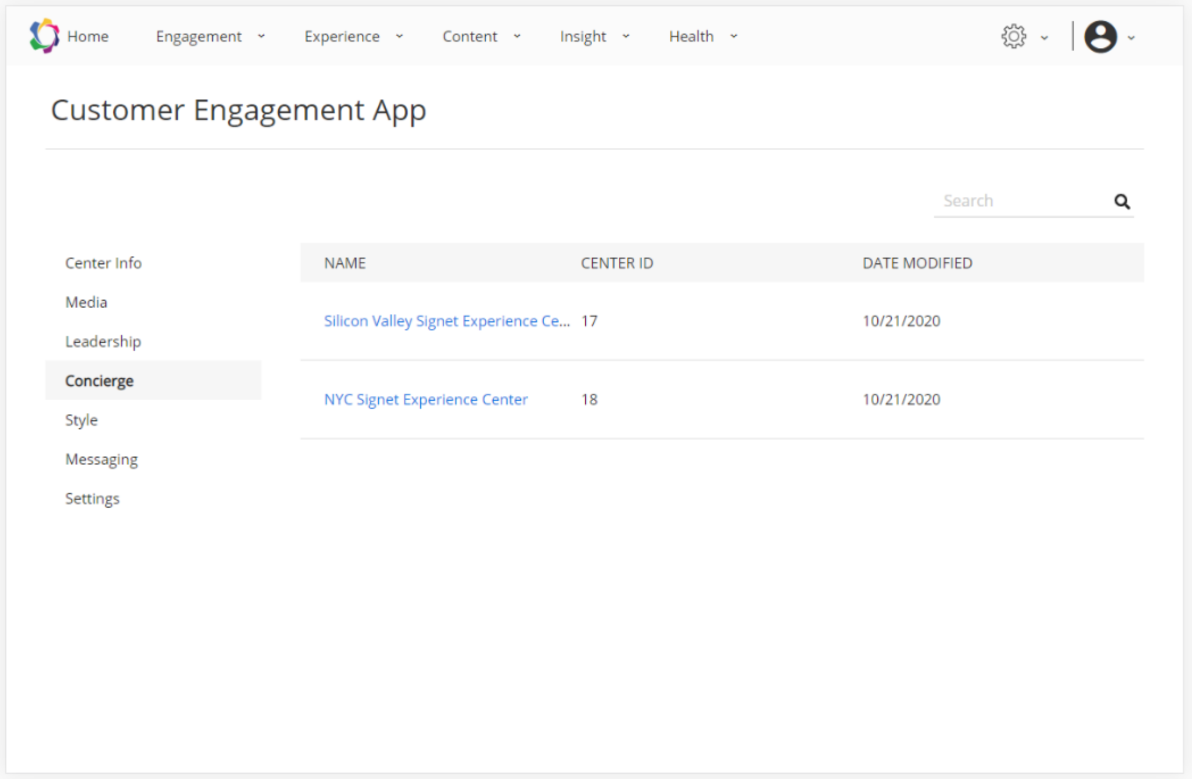
The “Product” field for the uploaded media will be updated with the selected products: Customer Portal and with other products if the user will choose it while uploading the media.

Clicking on the **'Cancel'** button user will return to the CE App > Media screen.

8.1.4. CONCIERGE

On the Concierge page, user can see the Centers list. User can manage concierge options by each center separately.

Information on the 'Concierge' page is organized in two levels: 1 – Categories and 2- Places of interests.



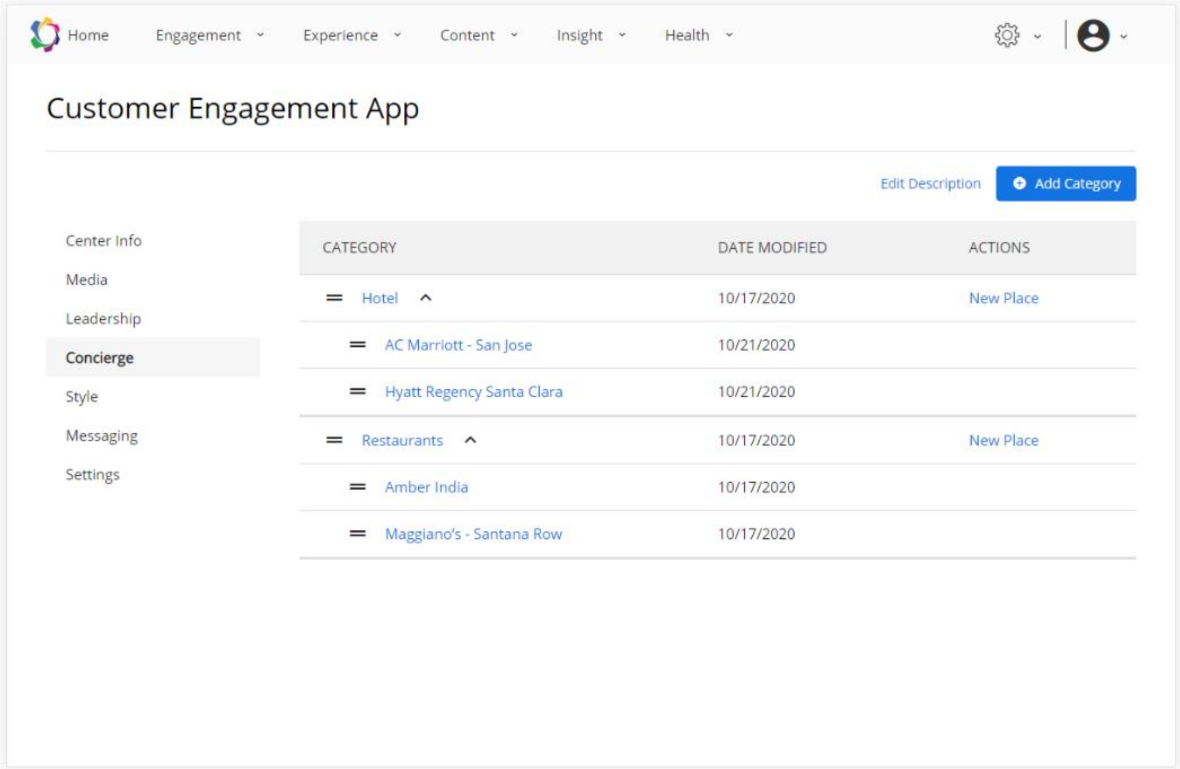


Figure 55. Concierge main page

CREATE A NEW CONCIERGE CATEGORY

User can create a new category by pressing 'Add Category' button.

Field	Data
Category Name	1. Required 2. Freeform text field 3. Max length: 100 characters 4. Error message: Category Name is required
Category Description	1. Required 2. Freeform text field 3. Max length: 500 characters 4. Error message: Category Description is required
Category Thumbnail	1. Required 2. Image (1:1) 3. File format: JPG, JPEG, PNG 4. Max file size: 100 Mb 5. Error message: Category Thumbnail is required

CREATE A NEW PLACE OF INTEREST

For creation of place of interest, user should press the 'New Place' button in the grid.

Field	Data
Place of Interest Name	1. Required 2. Freeform text field 3. Max length: 100 characters 4. Error message: Place of Interest Name is required
Website	1. Optional 2. Text field 3. Max length: 120 characters 4. Validation for the correct structure http or https://www.website.com
Place of Interest Short Description	1. Required 2. Text field

	3. Max length: 250 characters 4. Error message: Center Short Description is required
Country	1. Optional 2. Dropdown
Address Line 1	1. Optional 2. Text field 3. Max length: 50 symbols
Address Line 2	1. Optional 2. Text field 3. Max length: 35 symbols
City	1. Optional 2. Text field 3. Max length: 58 symbols
State	1. Optional 2. Dropdown
Zip/Postal Code	1. Optional 2. Text field 3. Only numbers 4. Max length: 10 symbols
Phone Number	1. Optional 2. Only numbers 3. Max length: 20 symbols
Center Info Media	1. Required 2. File format: PNG, mp4, JPG, JPEG 3. Max file size: 5 GB 4. Multiple media uploading 5. Error message: Media is required
Place of Interest Overview	1. Optional 2. Freeform text field 3. Max length: 1000 symbols

User can change the order of places inside a category by drag and drop them.

8.1.5. STYLE (fields for new Customer Portal layout)

On that page user can provide different colors that will be used for different components in CE Client App.

Depending on the layout selected on the Settings tab (Layout Option B or Modern Outline Icon) user can manage styles of the different UI elements. User can manage style for each Center or use Default Settings.

FIELD	LAYOUT B (OLD LAYOUT)	LAYOUT A (NEW LAYOUT)
HEADER STYLES		
Header Color	+	+
Header Image	+	+
Header Opacity Percentage (new filed)	-	+
Logo Image	+	+
Header Text Color	+	-
Sign Out Button Color	+	-
Sign Out Button Text Color	+	-
MAIN NAVIGATION STYLES:		
Nav Background Color	+	+
Nav Background Opacity Percentage (new filed)	-	+
Nav Tab Gradient Top Color	+	+
Nav Tab Gradient Bottom Color	+	+
Nav Icon Color	+	+
Nav Text Color	+	+
Nav Active Tab Gradient Top Color	+	+

Nav Active Tab Gradient Bottom Color	+	+
Nav Active Icon Color	+	+
Nav Active Text Color	+	+
POD STYLES:		
Pod Header Color	+	+
Pod Header Text Color	+	+
Primary Pod Background Gradient Top Color	+	+
Primary Pod Background Gradient Bottom Color	+	+
Primary Pod Background Opacity Percentage (new)	-	+
Secondary Pod Background Gradient Top Color (new)	-	+
Secondary Pod Background Gradient Bottom Color (new)	-	+
Secondary Pod Background Opacity Percentage (new)	-	+
Pod Text Color (new)	-	+
GENERAL STYLES:		
Font	+	+
Primary Brand Color	+	+
Primary Button Text Color (new)	-	+
Body Text Color (new)	-	+
Secondary Button Color (new)	-	+
Secondary Button Text Color (new)	-	+
Hyperlink Color	+	+

Sub-Header Text Color	+	+
Sub-Header Text Weight	+	+
Agenda Expanded Button Color (new)	-	+
Agenda Expanded Button Opacity Percentage (new)	-	+
Rating Pod Color (new)	-	+
Rating Pod Line Color (new)	-	+
Rating Text Color (new)	-	+
Line Color (new)	-	+
Background Color (new)	-	+
Background Image (new)	-	+
Background Overlay Color (new)	-	+
Background Overlay Opacity Percentage (new)	-	+
Slideout Background Color (new)	-	+
Browser Background Color	+	-
Logo Screen Image	+	+

All styles provided on the page will be applied to all centers.

User can restore default style settings for Centre by clicking on the 'Restore Defaults' link. After clicked 'Restore Defaults' link custom style for Center should be restored by the default style colors.

Figure 56. Restore Defaults

8.1.6. MESSAGING

Messaging front page will let users to choose which center's settings to modify.

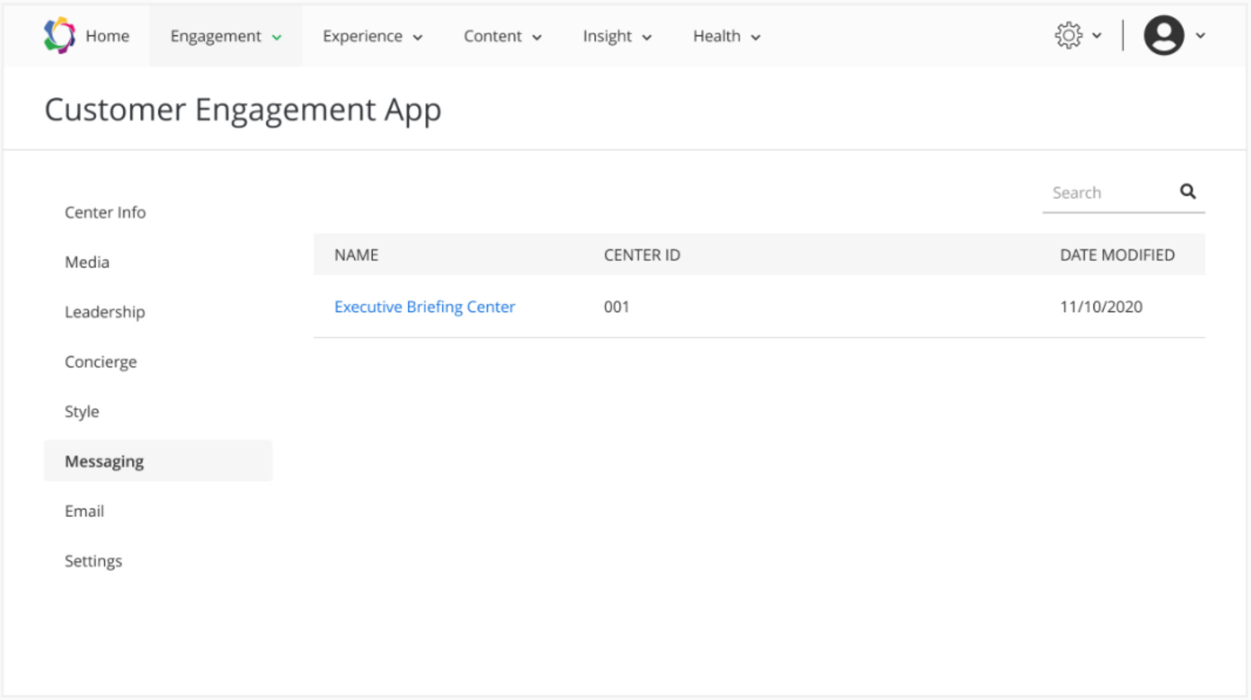


Figure 57. Messaging - Select Center screen

On the 'Messaging' page user can provide different salutations (Text/Image) for three main briefing conditions:

- Pre-Briefing Experience
- Day-of Briefing Experience
- Post-Briefing Experience
- Thank You Messages

On that page it is possible to provide different salutations for different centers using the dropdown 'Center'.

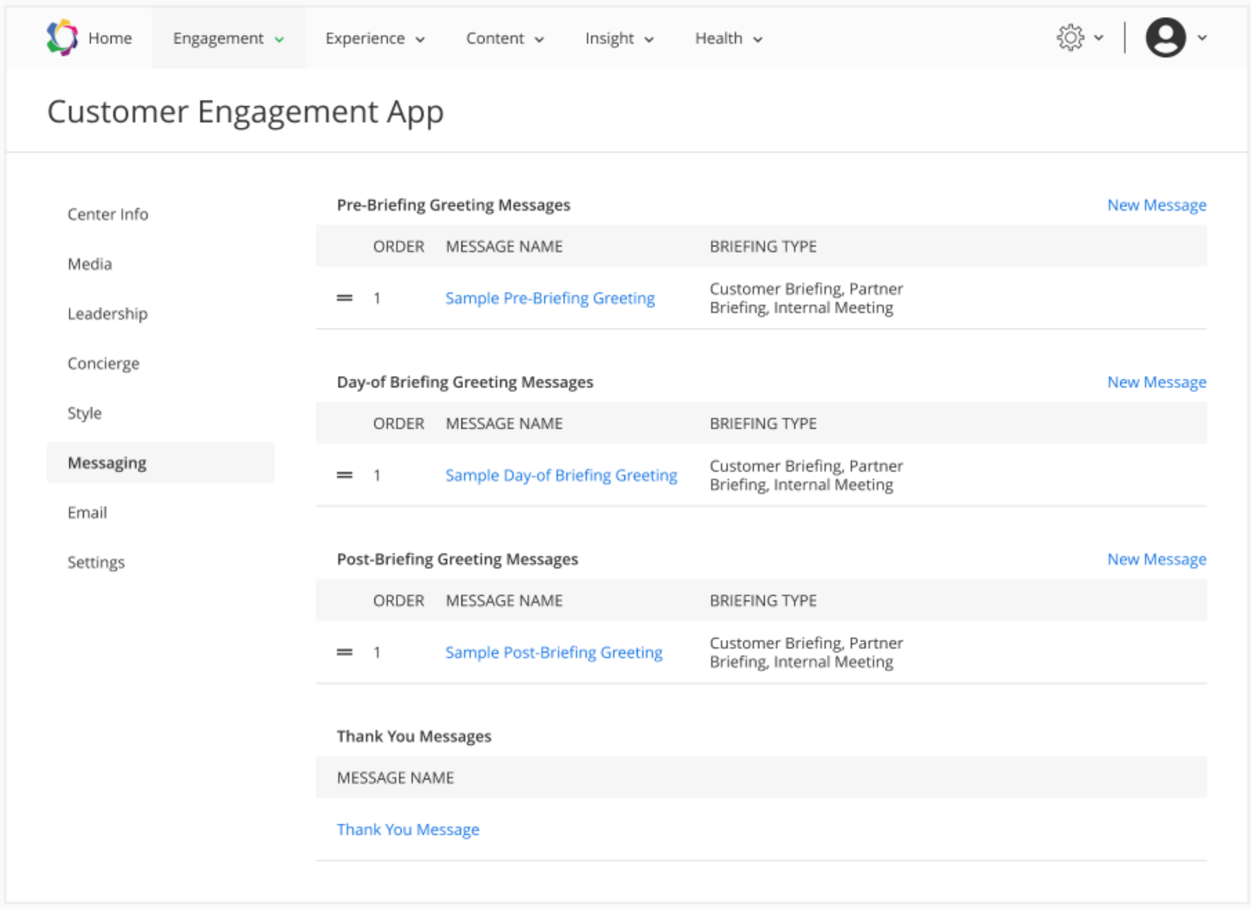


Figure 58. Messaging main page

CREATE A NEW SALUTATION

Clicking on 'New Message' button at the top of table header user can create message for needed meeting period.

Field	Data
Message Name	1. Required 2. Freeform Text field 3. Max length: 100 characters 4. Error: Message Name is required
Message Image	1. Optional 2. Image 3. Max image size: 100 Mb 4. File type: JPG, JPEG, PNG
Message Body Text	1. Required 2. Editor box

	3. Max length: 1000 characters 4. Error: Message Body Text is required
Briefing Type	1. Required 2. Dropdown with the option to select briefing type. 3. Multiple selection is available 4. Error: Briefing Type is required

Inside each WYSIWYG editor text box user can highlight part of the text in **bold**/*italic/*<u>underline</u> and/or add an URL link.

User can change messages order by drag-drop them manually (except for Thank you messages). The system shall remember 'drag drop' order when the user leaves the program. The messages shall be shown in Client App according to this sorting

8.1.7. CONFIGURATION

The Configurations page will now have the Quick Links and Application Tabs.

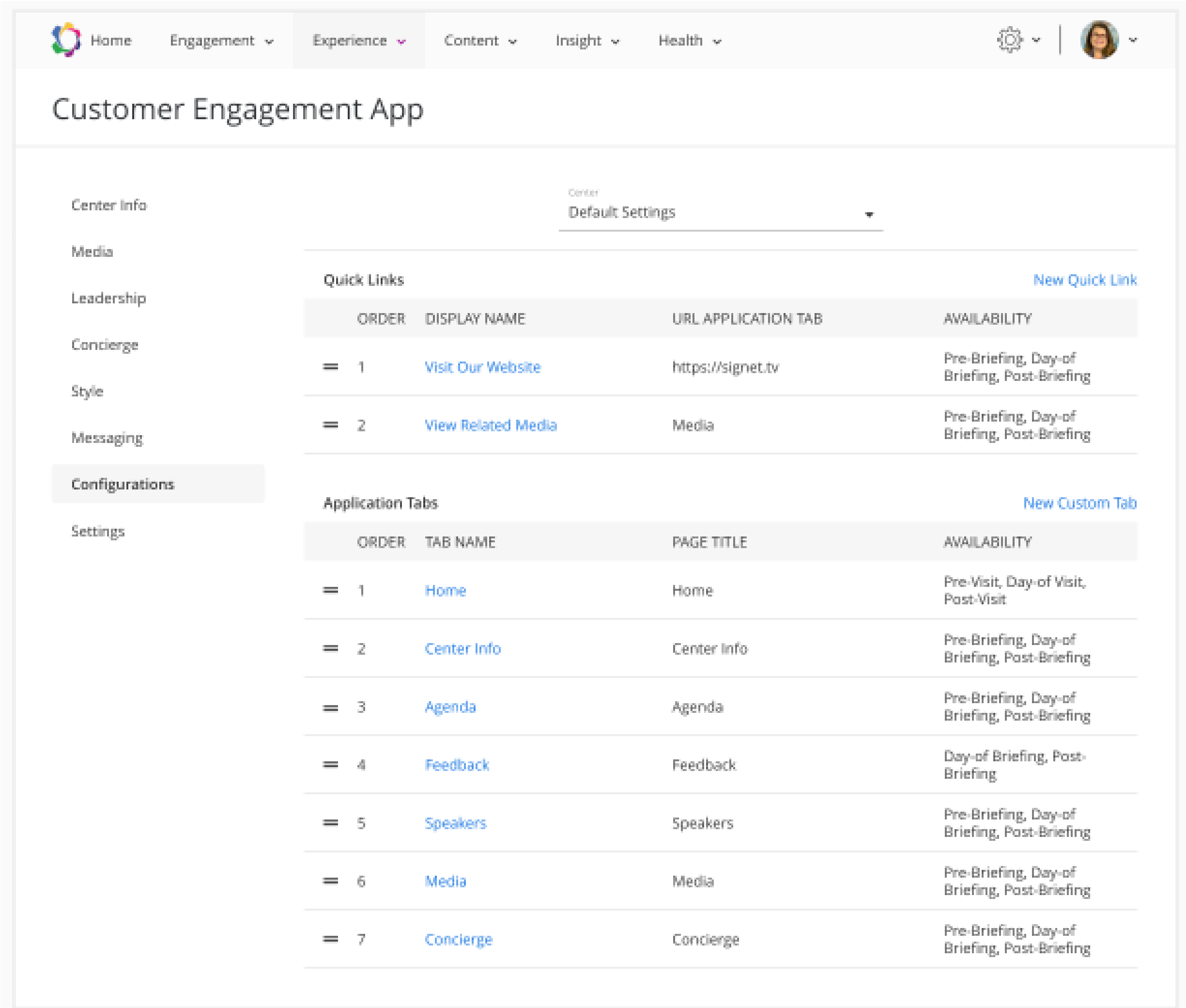


Figure 59. Configuration page

QUICK LINK

The ‘Quick Link’ section allows use to adjust different links in the ‘Quick Links’ box in CE Client App.

To create a new quick link user should click on ‘New Quick Link’ button.

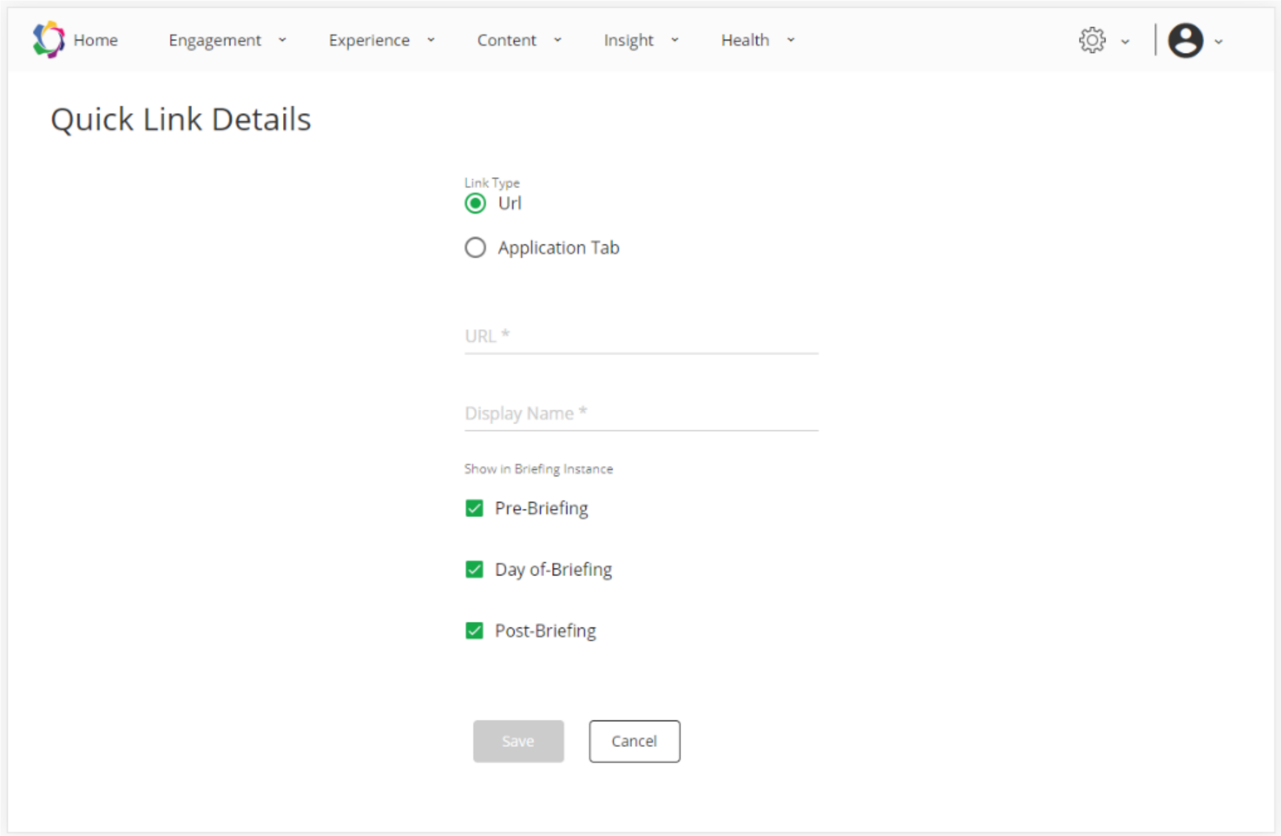


Figure 60. Create a new quick link form

On 'Quick Link Details' form user can select two options:

- provide an URL to an external web site
- reference to internal tabs of CE Client App

Also, user should specify the stage of briefing (Pre/Day-of/Post- Briefing) during which this information will be available in CE Client App.

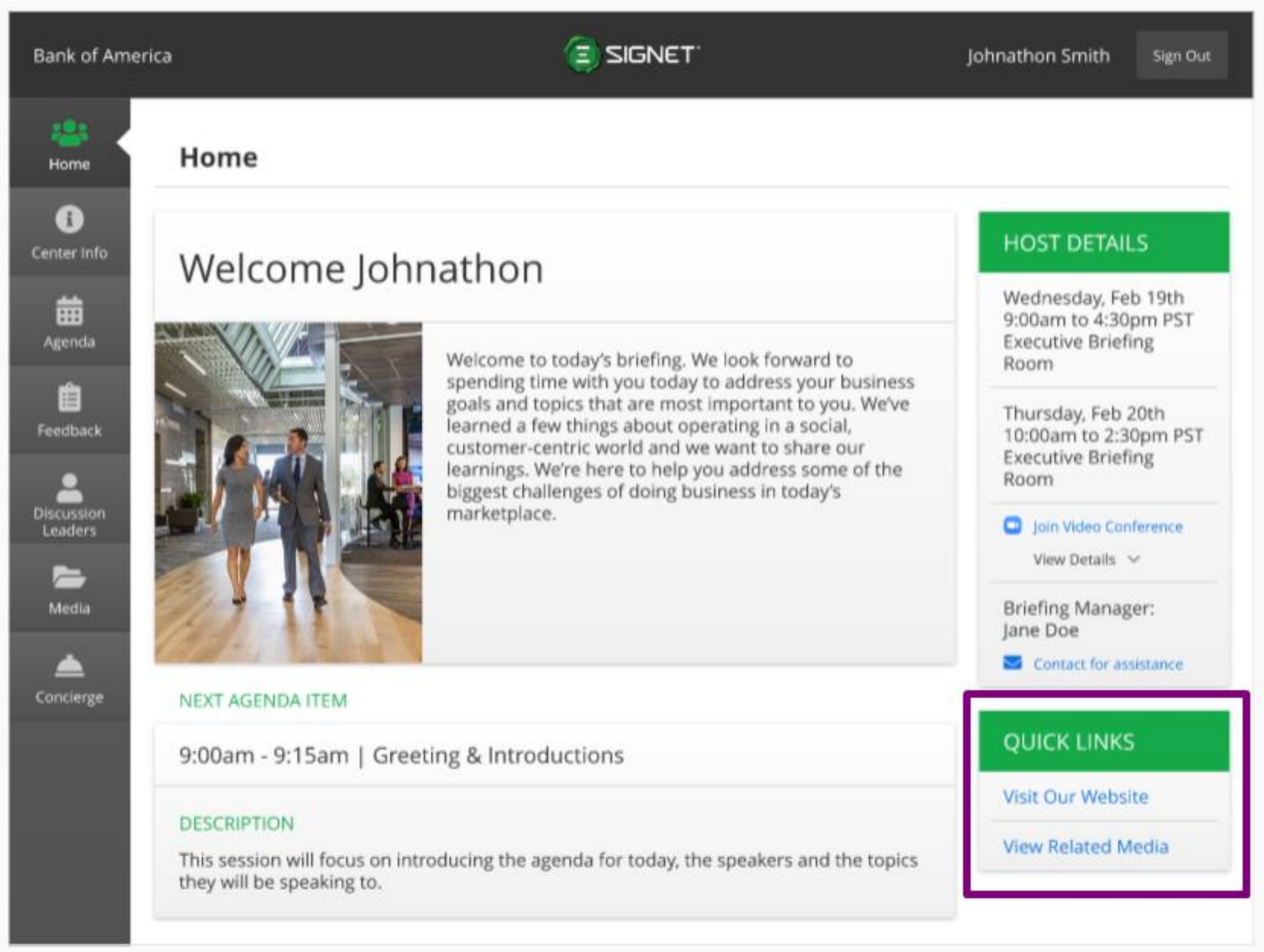


Figure 61. Quick Links on CE Client App

APPLICATION TABS

The table will show CE Client App Tab's order number, tab name, page title, and availability during briefing stages (Pre-/Day-of/Post- Briefing and/or Disabled).

The user can change the order of the CE Client App Tabs by drag drop. User can edit exist application tab by click on its name or creating a new one.

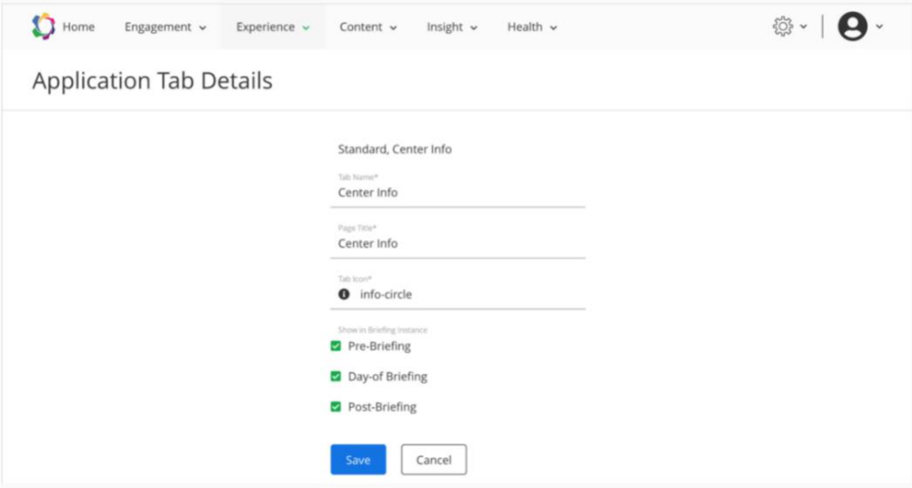


Figure 62. Application Tab Details form

Clicking on 'New Custom Tab' user navigates to 'Custom Tab Details' page where they can create a new custom tab for CE Client App.

On that form user should indicate all required information and only after that 'Save' button should become active.

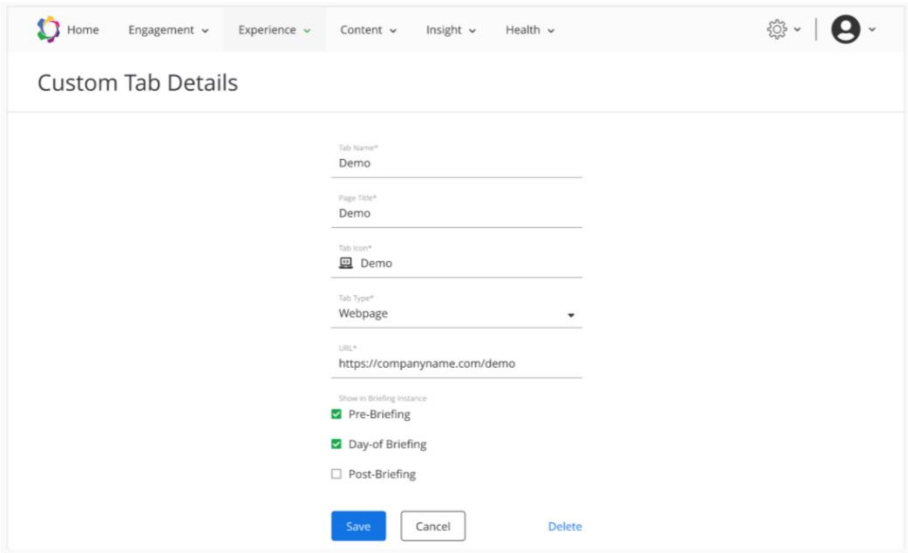


Figure 63. Custom Tab Details form

For custom tab user can select predefined icon.

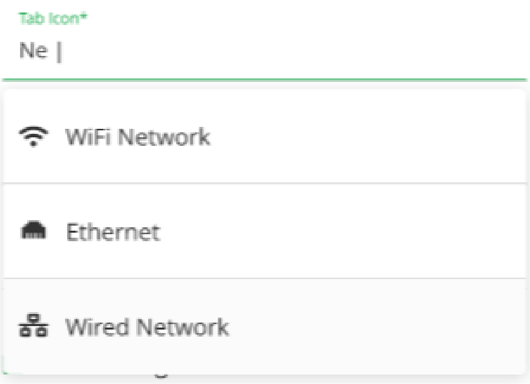


Figure 64. Custom tab icon

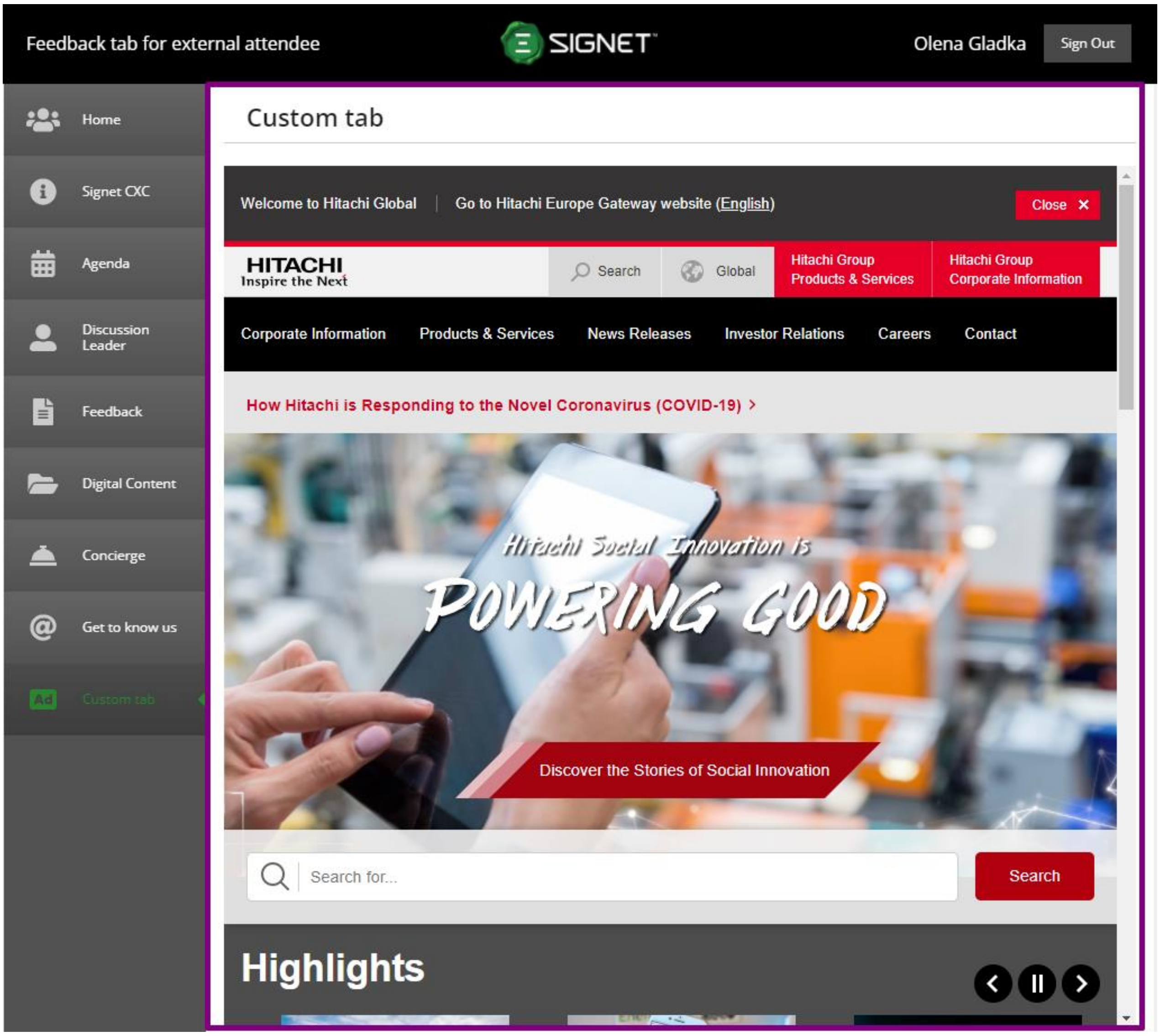


Figure 65. CE Client App custom tab and iframe custom type - website

NOTES:

Sometimes it can be a problem with displaying a website inside Custom tab screen.

In our example PTC company is prohibited to display their website in an iframe, and as a result we cannot display such website in our CE Client App.

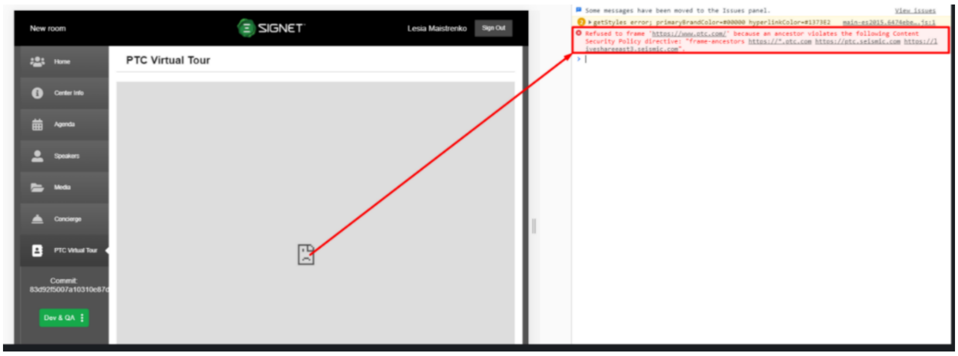


Figure 66. Website iFrame problem

For the website displayed in an iframe, this must be allowed by the policy of the website itself.

To solve that problem client (in our case it is PTC) should add CE App URL to the list of those who can display their website in an iframe.

8.1.8. SETTINGS (fields for new Customer Portal layout)

User can change the Customer Portal layout in the Settings tab.

FIELD	LAYOUT B (OLD LAYOUT)	LAYOUT A (NEW LAYOUT)
Customer Portal Layout (new field)	+	+
Navigation Position (new)	disabled	Drop-down with Left/Bottom options
Select Briefing Header Name	+	-
Show Home Visiting Company Logo toggle	+	+
Home Pre-Briefing Separator Label	+	-
Home Post-Briefing Separator Label	+	-
Home Briefing Details Container Title	+	-
Home Quick Links Container Title	+	-
Speaker Label	+	+
Home Details Container Info to Display	+	+
Allow Contact Briefing Manager Email Feature	+	+
Allow Contact Speaker Email Feature	+	+

On the 'Settings' page user can do multiple adjustments that will affect appearance of the 'Briefing' tab in CE Client App and switch on/switch off the 'Contact Speaker' link on the 'Speaker' page.

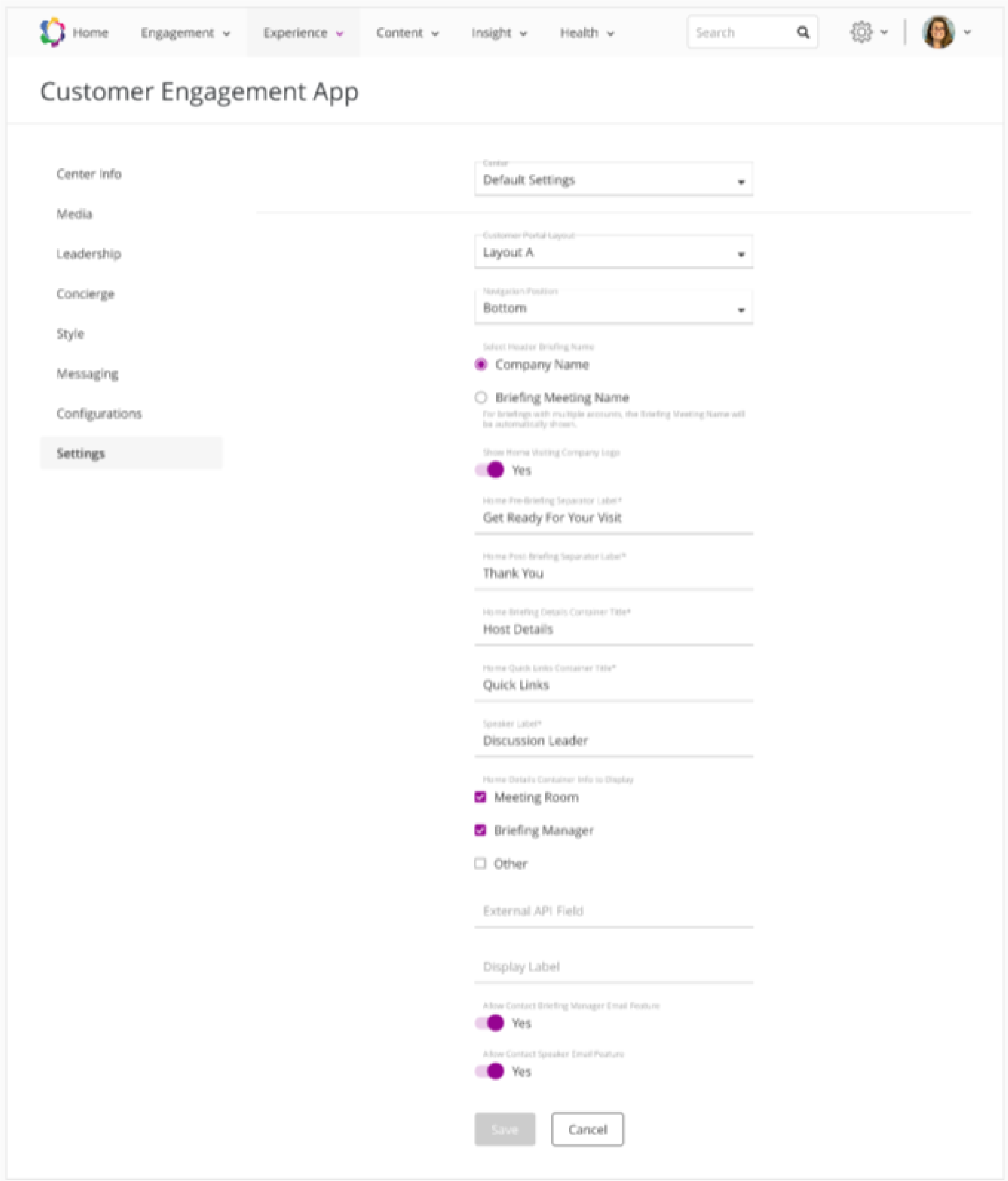


Figure 67. Settings page

User can show or hide Visiting Company Logo on the CE Client App Home page enabling or disabling ‘Show Home Visiting Company Logo’ toggle. Toggle is ON (Yes) by default.

If the logo is toggled on “Yes” but no logo for the company has been uploaded, then it will just display the name.

With the help of separator labels user can customize CE Client App Home page:

- **Home Pre-Briefing Separator Label** - on that field user can specify text which separates information sections on the CE Client App Home page during pre-briefing stage
- **Home Post-Briefing Separator Label** - on that field user can specify text which separates information sections on the CE Client App Home page after briefing
- **Home Briefing Details Container Title** - on that field user can specify container title on the CE Client App Home page where will display briefing duration information, briefing manager/host name.
- **Home Quick Links Container Title**
- **Speaker Label**

User can provide the possibility to contact with Briefing Manager and/or Speaker from CE Client App.

When the toggle 'Allow Contact Briefing Manager Email' is on (by default), the 'Contact for assistance' link will be visible in CE Client App – Home page.

If the toggle is off should be displayed only briefing manager's First Name and Last Name.

When the toggle 'Allow Contact Speaker Email' is on (default value), the 'Contact Speaker' link will be visible in CE Client App – Discussion Leader tab. If the toggle is off the 'Contact Speaker' link will be invisible.

The radio button 'Select Header Briefing name' allows user to display in CE Client App either 'Company Name' (by default) or 'Briefing Meeting Name' on the Header row.

The checkbox 'Briefing home screen right side pod details to display' section allows displaying/hiding entities Meeting Room, Briefing Manager, Other) in the Briefing Details box in CE Client App.

8.2. VIRTUAL WARMER

NOTES:

1. The "Default Settings" will be available only for users who have access to **ALL** centers that belong to a tenant.

2. In case the user has access only to several of the centers that belong to a tenant than on the Styles and Settings pages in the Center drop-down they will see only those centers and without the "Default Settings".

Another feature available for our users on the Experience menu is Virtual screens for each briefing. With the help of the Virtual screen menu, user can manage how virtual screens will look like for each briefing depending on the industry.

8.2.1. OVERVIEW

The first tab where user navigates from Experience – Virtual screen is Overview page. On this page user can see a static information about Virtual Welcome product.

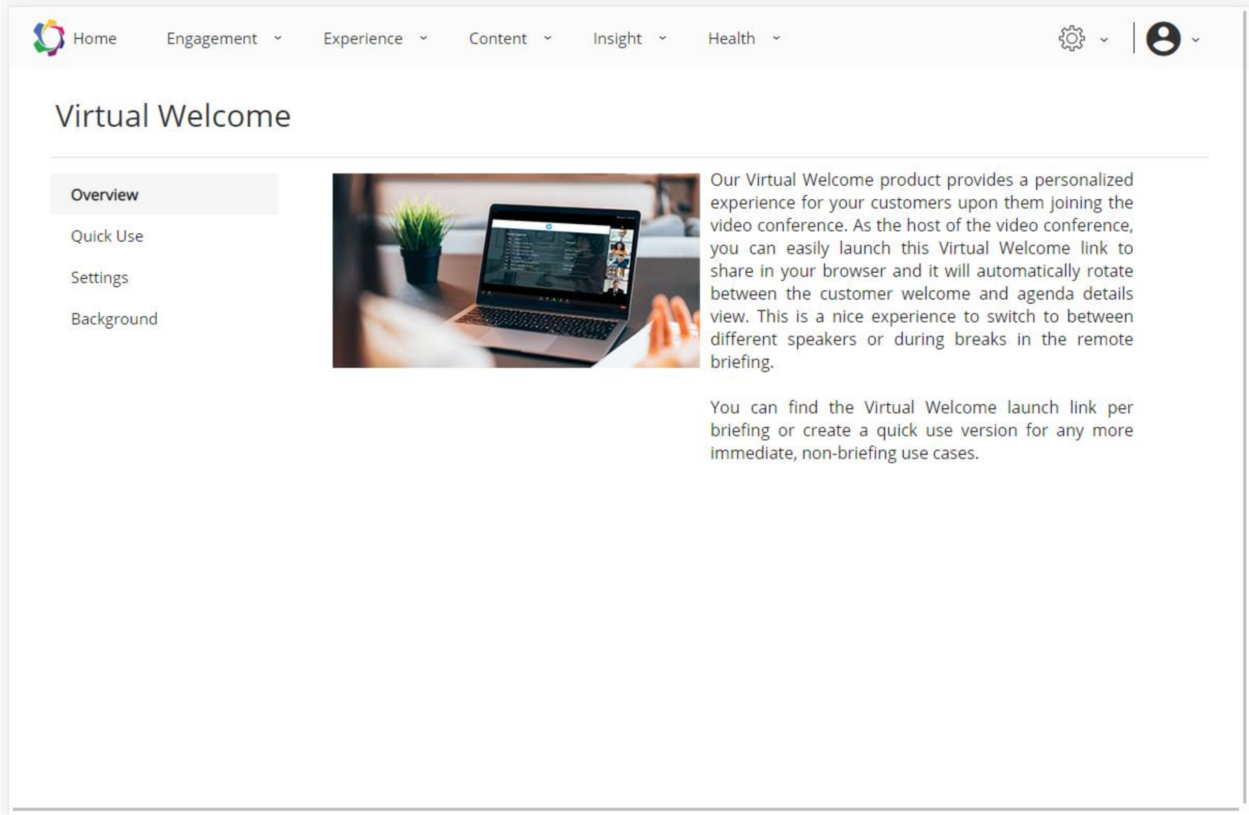


Figure 68. Virtual Welcome overview page

8.2.2. QUICK USE

If the Briefing Manager needs to create a quick temporary event, they can easily set up it on the Quick Use form.

On the main Quick Use page user will see a table with previously create quick uses.

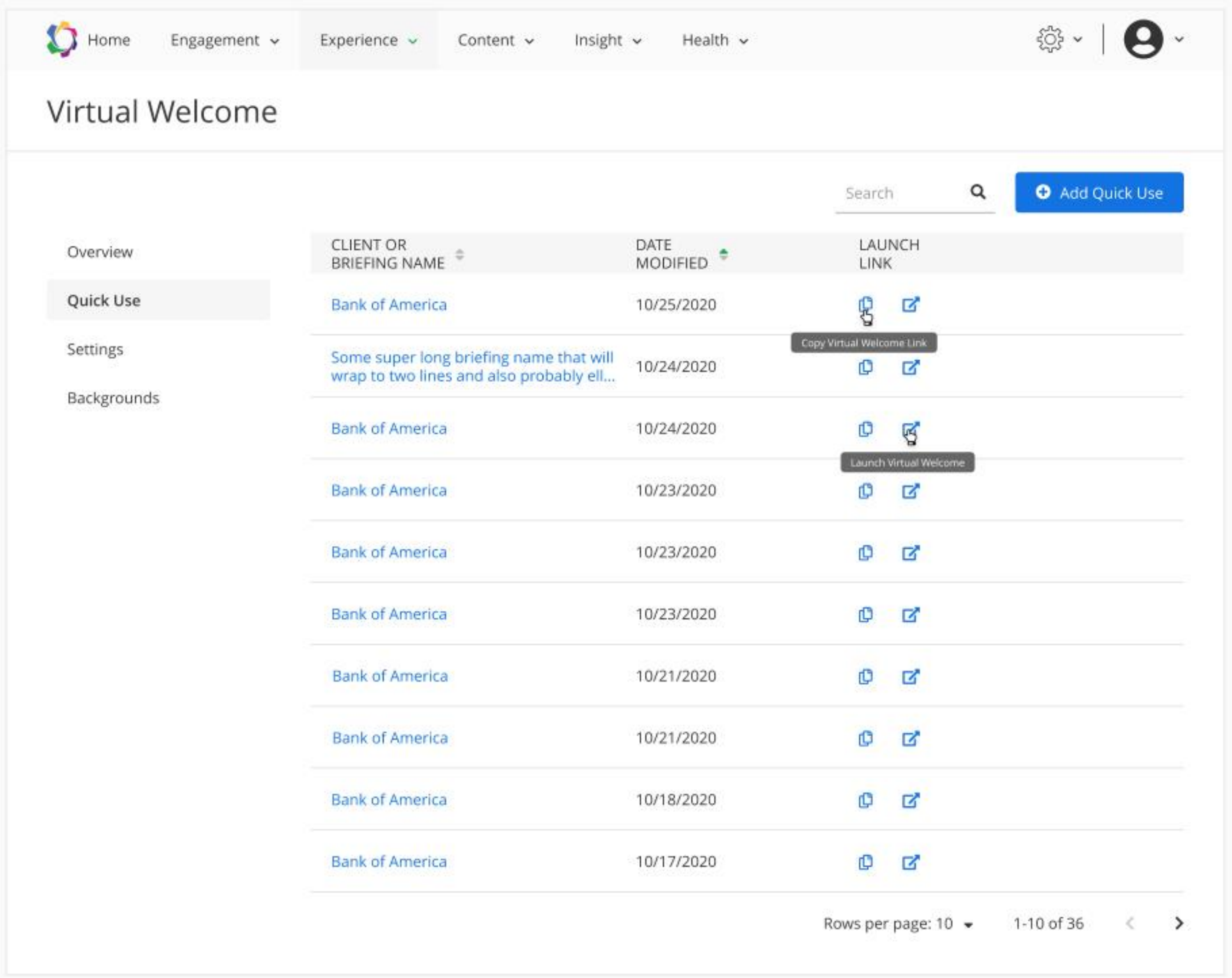


Figure 69. Quick Use list

User can open Virtual Welcome on the new tab or copy link and send it.

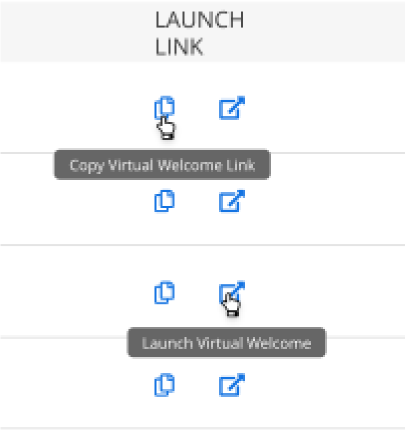


Figure 70. Launch Link

CREATE A NEW QUICK LINK

User can create a new quick use form clicking on 'Add Quick Use' button.

Field	Data
Client or Briefing Name	1. Required 2. Freeform text field 3. Max length: 100 characters 4. Error message: Client or Briefing Name is required
Customer logo	1. Optional 2. Upload button 3. Supported files: png, jpeg, jpg 4. Max file size: 50 MB
Industry	1. Required 2. Drop-down with a list of Industries 3. Error: Industry is required
Agenda Details	1. Time: - Required - Time format HH:MM + am/pm - Max length: 7 characters - Error: Industry is required 2. Agenda Name: - Required - Freeform text field - Max length: 100 characters

	- Error: Agenda Name is required - Max agenda items list – up to 10 items 3. Speaker: - Optional - Freeform text field - Max length: 100 characters

After filling in all the required information 'Save' button should become active and user can generate the 'Virtual Welcome' link for that quick event.

8.2.3. STYLES (new fields)

On Settings page user can set up appropriate images and color for the Virtual Welcome screens.

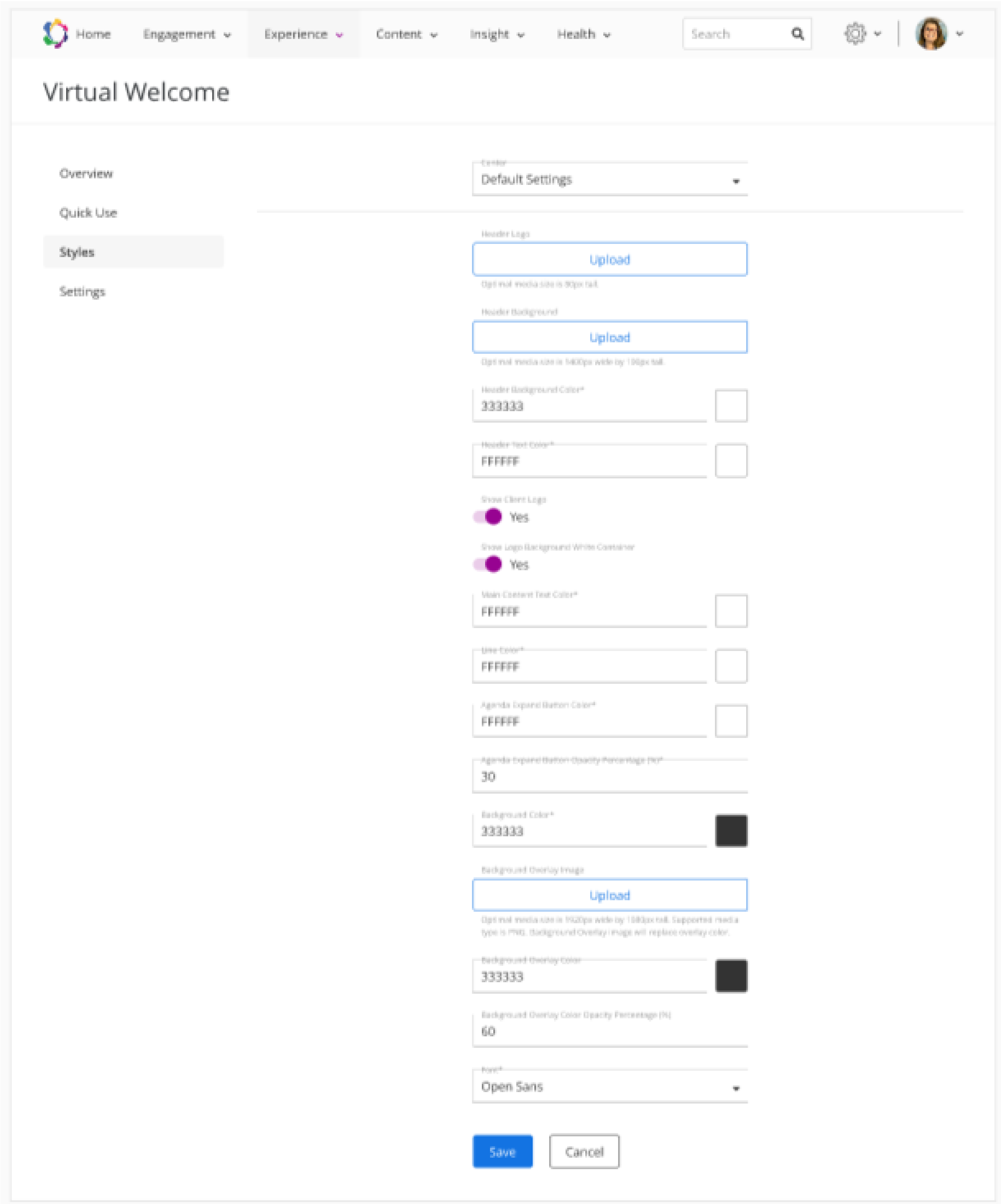


Figure 71. Styles page

Field	Data
Center drop-down (new field)	1. Drop-down with the list of available centers 2. Default Settings displays first
Header Logo Image	1. Optional 2. File format: JPG, JPEG, PNG 3. Max file size: 50 Mb
Header Background	1. Optional 2. File format: JPG, JPEG, PNG 3. Max file size: 5 GB
Header Background Color (new field)	1. Required 2. HEX code #333333 is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Header Text Color is required
Header Text Color	1. Required 2. HEX code #FFFFFF is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Header Text Color is required
Show Client Logo toggle (new field)	1. Optional 2. Toggle with options – ON/OFF 3. ON is set by default
Show Logo Background White Container toggle	1. Optional 2. Toggle with options – ON/OFF 3. ON is set by default
Main Content Text Color	1. Required 2. HEX code #FFFFFF is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Main Content Text Color is required

Line Color (new field)	1. Required 2. HEX code #FFFFFF is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Line Color is required
Agenda Expanded Button Color (new field)	1. Required 2. HEX code #FFFFFF is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Agenda Expanded Button Color is required
Agenda Expanded Button Opacity Percentage (new field)	1. Required 2. 30% is set by default 3. Freeform text field 4. Max length: 3 characters 5. Error message: Agenda Expanded Button Opacity Percentage is required
Background Color (new field)	1. Required 2. HEX code #333333 is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Background Color is required
Background Overlay Image	1. Optional 2. File format: PNG 3. Max file size: 50 Mb
Background Overlay Color	1. Optional 2. HEX code #333333 is set by default 3. Freeform text field 4. Max length: 9 characters
Background Overlay Opacity Percentage	1. Optional 2. Freeform text field 4. Value "40" is set by default 5. Max length: 3 characters 6. Only numbers

Font	1. Required 2. Drop-down 3. Open Sans is set by default 4. Error message: Font is required

8.2.4. SETTINGS (new functionality)

On Settings page user can set up appropriate images and color for the Virtual Welcome screens.

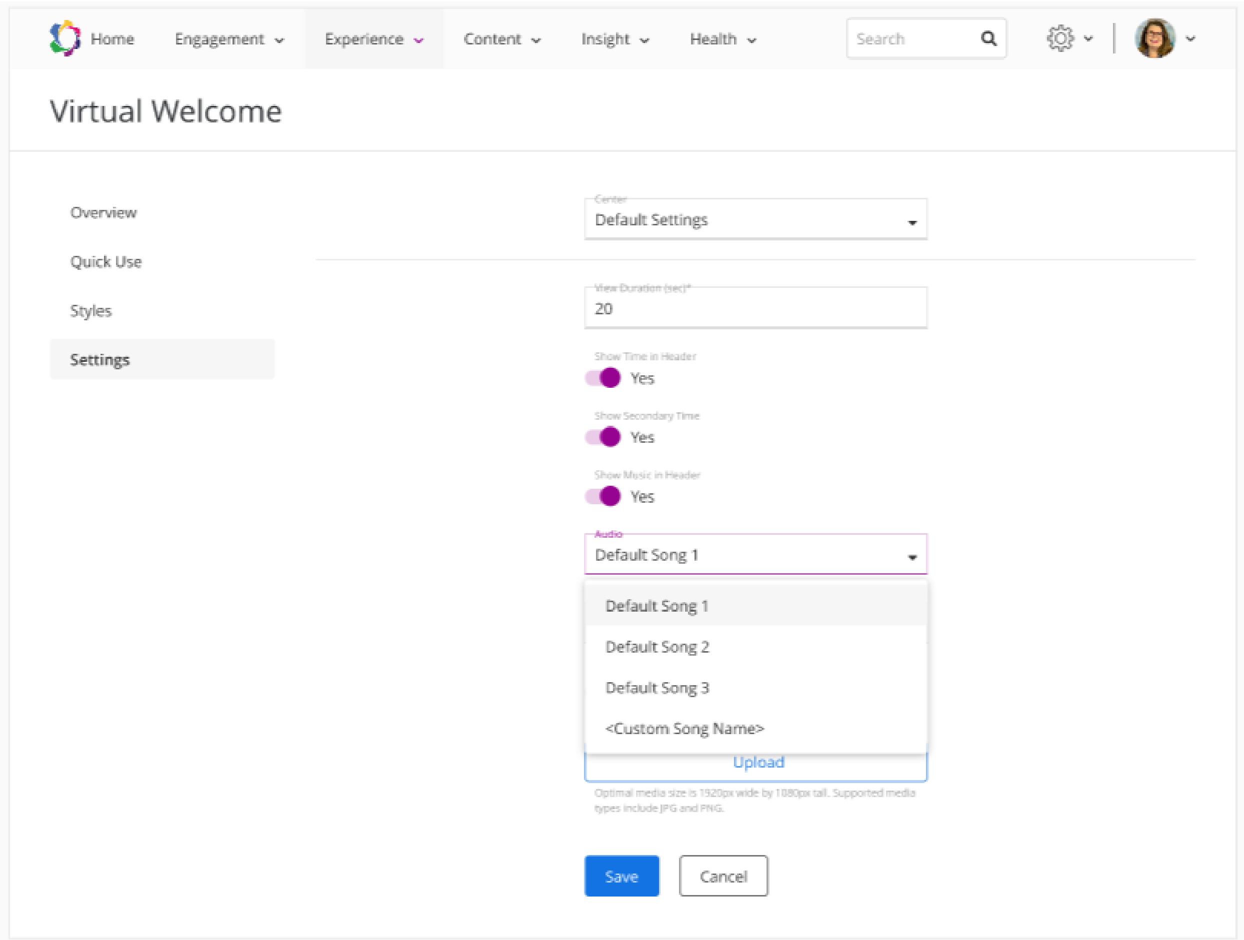


Figure 72. Settings page

Field	Data
Center drop-down (new field)	1. Drop-down with the list of available centers 2. Default Settings displays first
View Duration	1. Required 2. 20 sec is set by default 3. Max length: 2 characters 5. Error message: View Duration is required
Show Time in Header	1. Toggle with ON/OFF options 2. ON is set by default 3. Shows time in the format of am/pm with the briefing center time zone abbreviation.

Show Secondary Time	1. Toggle with ON/OFF options 2. ON is set by default 3. Shows time of the additional time zone in the format of am/pm with the additional time zone abbreviation.
Show Music in Header (new field)	1. Optional 2. Toggle with ON/OFF options 3. OFF is set by default
Audio drop-down (new field)	1. Optional 2. The drop-down is inactive when the "Show Music in Header" toggle is turned off 3. When user turns on the "Show Music in Header" toggle they can select one of the predefined audio file from the list. 4. User can select only one audio file
Speaker Label	1. Required 2. Freeform text field 3. "Discussion Leader" indicated by default 4. Max length: 50 characters 5. Error message: Speaker Label is required
Show Speaker headshot	1. Toggle with ON/OFF options 2. ON is set by default 3. Shows speakers headshots on the Agenda screen
Default Additional Media	1. Optional 2. Upload button 3. File format: PNG, JPG 4. Max file size: 5 Gb 5. User can upload multiple files

ADD MEDIA FROM THE CONTENT LIBRARY

User can select already uploaded media file (image/video) from the Content > Media menu by clicking on the 'Add Media' button.

User can use the general options to filter media files:

- filter media by type (only image)

- Users can find the needed media through existing media items in the Content Library tab with the help of the search field.

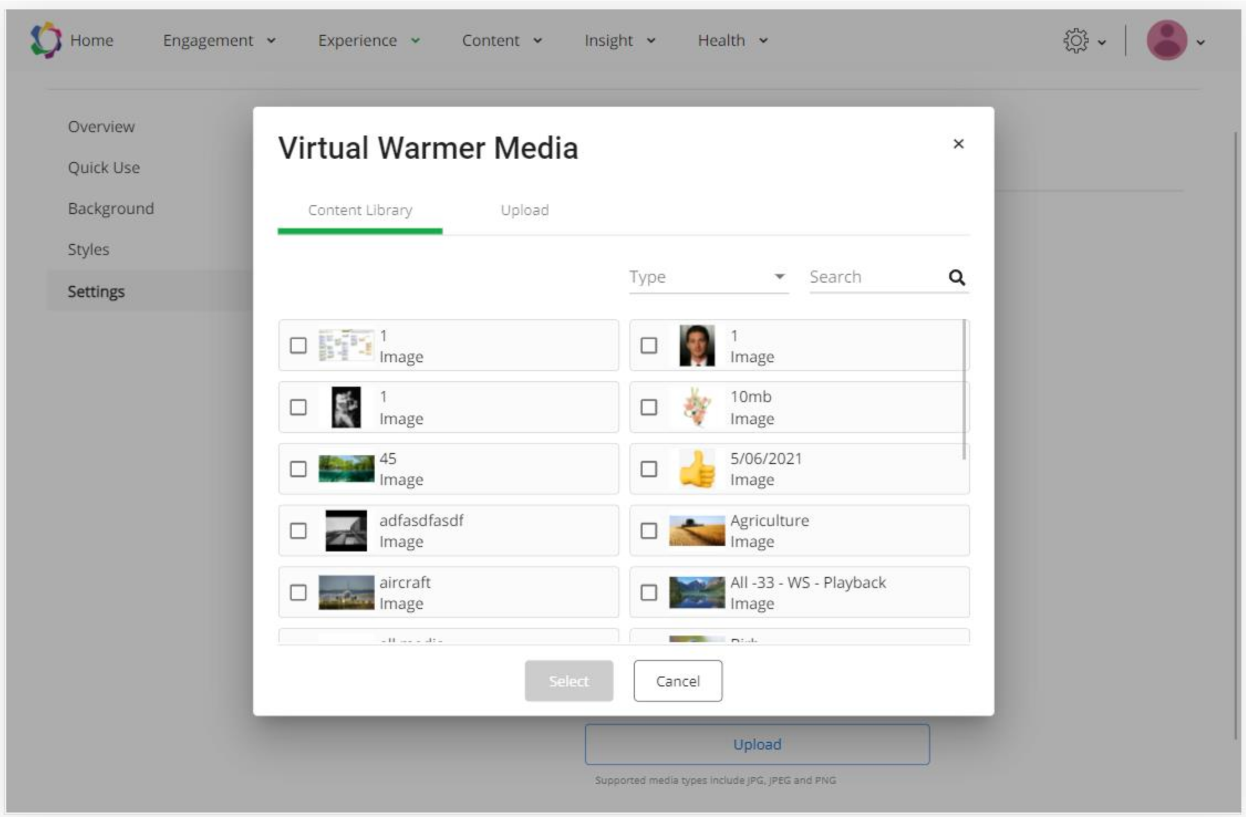


Figure 73. Add media from the Content Library menu

SELECT MEDIA FROM THE "CONTENT LIBRARY"

1. DEFAULT SETTINGS:

- The "Content Library" list will contain media files available for all centers (Center Access - 'All')
- Media added to the "Default Setting" will be available for other centers in the drop-down

2. SELECT MEDIA TO THE SPECIFIC CENTER:

- User will see only media related to the Center they have access to (the center for media item is indicated during media creation in the 'Center Access' field)
- The multiple media files selection is available. User should select the checkbox near desired media
- The user cannot add a media file that already presented in the table.
- The already added media will be shown as checked and inactive. The user cannot choose it again.

When the media file from the Content Library is added to the Settings page the "Product" field for the selected file can behave in the following ways:

- In case the Virtual Warmer product was already selected in the "Product" field on the Marketing page - nothing will be changed with this field.
- In case Virtual Warmer product was not added selected in the "Product" field on the Marketing page – when the user added media from the Content Library to the Media page this product will be added to that media in the Marketing page.

UPLOAD MEDIA DIRECTLY TO THE VIRTUAL WARMER

The user can upload a completely new media to the Additional Media section.

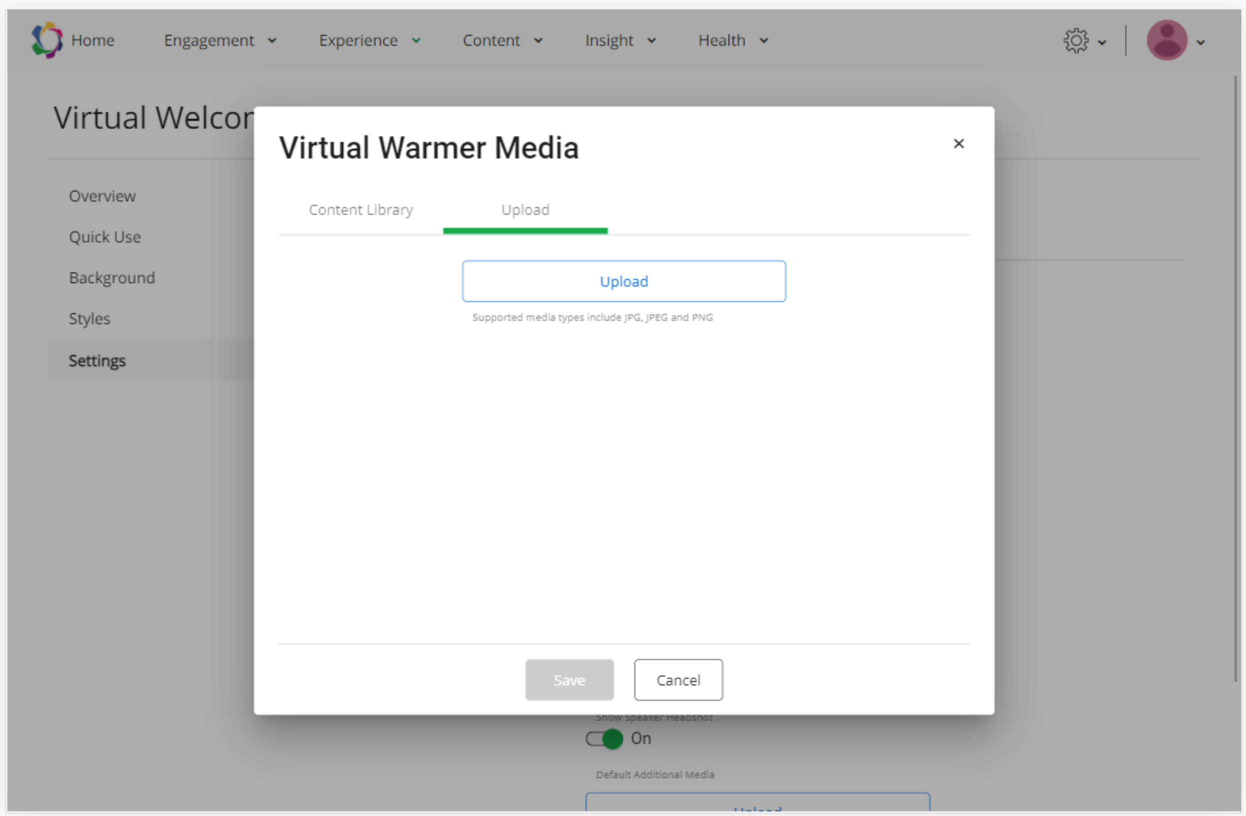


Figure 74. Direct media upload

The user can click on the "Upload" button to select a file from the device.

- Supported media types include JPG, JPEG, PNG
- Max size: 2 GB
- Only one file can be uploaded at a time

Once uploaded, the user will be able to complete the media fields with the following information:

Field	Data

Media	- required - will be filled with the uploaded media
Media Name	-required - freeform text field - max length: 500 symbols - Error: This field is required - Uploading file(name.file_extension) exists for the current client in database.
Media Short Description	-optional - freeform text field - max length: no restrictions except the technical constrains
Private - the private toggle will not affect any of the product **except the CE App**	-optional - "No" by the default - helper text: Private media will be disabled from being downloaded or emailed in the CE App.
Industry	- required - drop-down with the list industry created - All selected by the default - multiple selection is available - Error: This field is required
Center	- required - drop-down with the list of Centers the user has access to. - multiple selection is available - Error: This field is required
Product	- optional - drop-down with the list of available products but the default value will be the product for which we are uploading this media. This will value cannot be unchecked. The user can add more products. - multiple selection is available - If the center name exceeds the dropdown width, it will ellipsis and not wrap to the next line.

	- this dropdown is sorted by product name alphabetically, then center name secondarily.

Clicking on the **'Save'** button user will add the uploaded media to the Additional Media section and to the Content - Marketing page.

The "Product" field for the uploaded media will be updated with the selected products: Virtual Warmer and with other products if the user will choose it while uploading the media.

8.2.4. BACKGROUND

In that page user can manage background images for different industries. Depending on industry selected during briefing creation user should see an appropriate background colors in the Virtual Welcome screens.

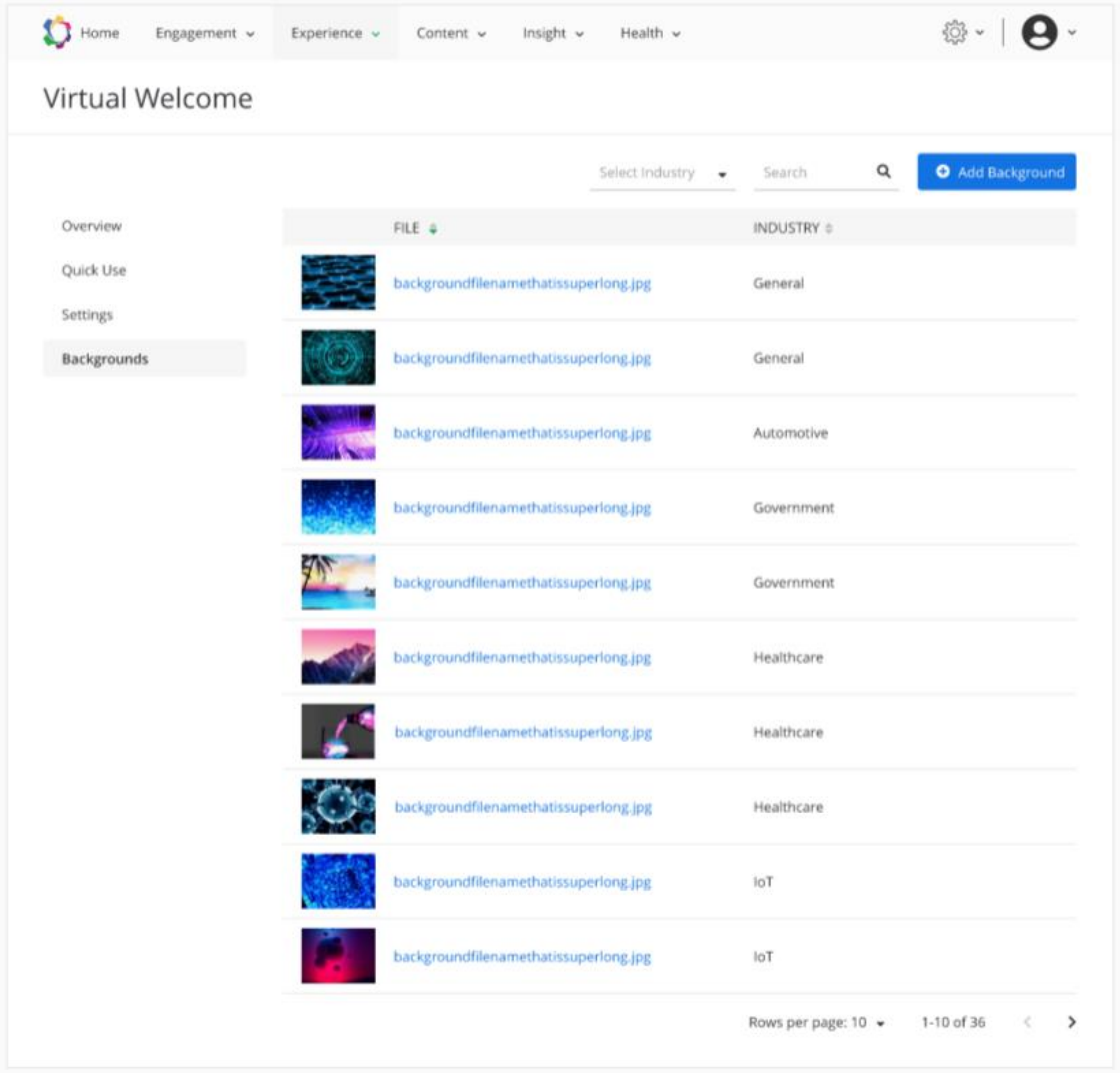


Figure 75. Backgrounds overview page

CREATE A NEW BACKGROUND

User can create a new background image clicking on 'Add Background' button.

Field	Data
Background Media	1. Required 2. Upload button

	3. Max image size: 5 Gb 4. File type: JPG, JPEG, PNG 5. Error: Background Media is required
Industry	1. Required 2. Drop-down with a list of Industries 3. Error: Industry is required

And after filling in all required information 'Save' button should become active and user can save new background.

User can edit background details by clicking on image name on the list. After that user navigates to 'Background Media Details' page on edit mode.

8.3. ON-SITE CHANNELS

8.3.1. WELCOME SCREEN

NOTES:

1. The “Default Settings” will be available only for users who have access to **ALL** centers that belong to a tenant.

2. In case the user has access only to several of the centers that belong to a tenant than on the following pages (Playback, Styles, Settings) in the Center drop-down they will see only those centers and without the "Default Settings".

8.3.1.1. OVERVIEW

The first tab where user navigates from Experience – On-Site Channels – Overview page. On this page user can see a static information about the product.

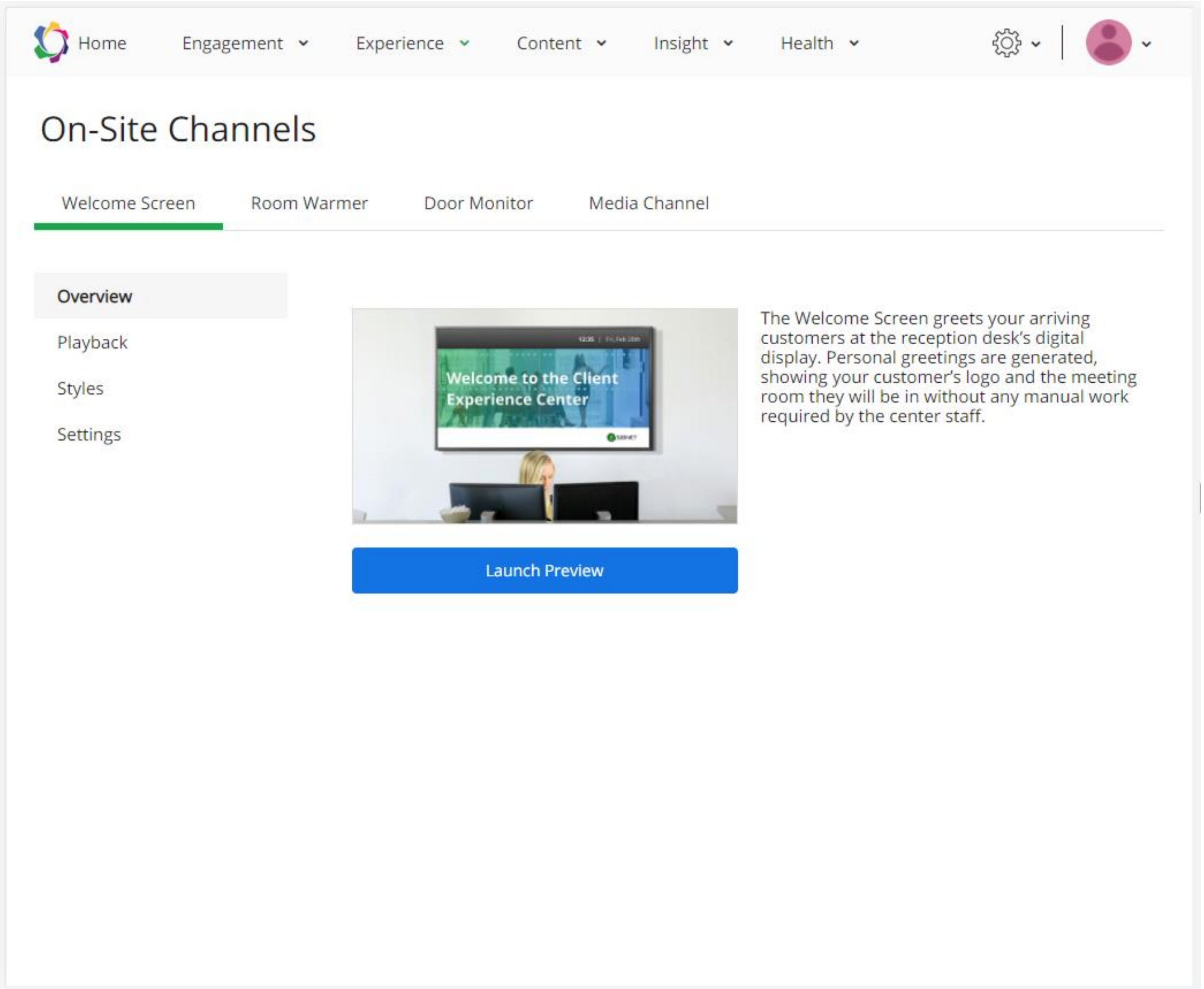


Figure 76. Welcome Screen product Overview page

LAUNCH PREVIEW

Clicking on the 'Launch Preview' button user will see a sample of product in a new browser tab.

User should see the 'Welcome Screen' product preview with the following information:

- Product will be launch to the user current default center
- Welcome Screen will be displayed with default Settings and Styles options
- For Multi-Client screen will be displayed the list of sample briefings (Briefing Date == current date)

The 'Welcome Screen' product should be displayed in full-screen mode (Not F11 like full screen, just feet the app to the size of the page)

8.3.1.2. PLAYBACK

In the Playback page user can see a list of the core product screens – General Welcome, Multi-Client Welcome, Client Welcome.

The core product screens are the same for all Centers.

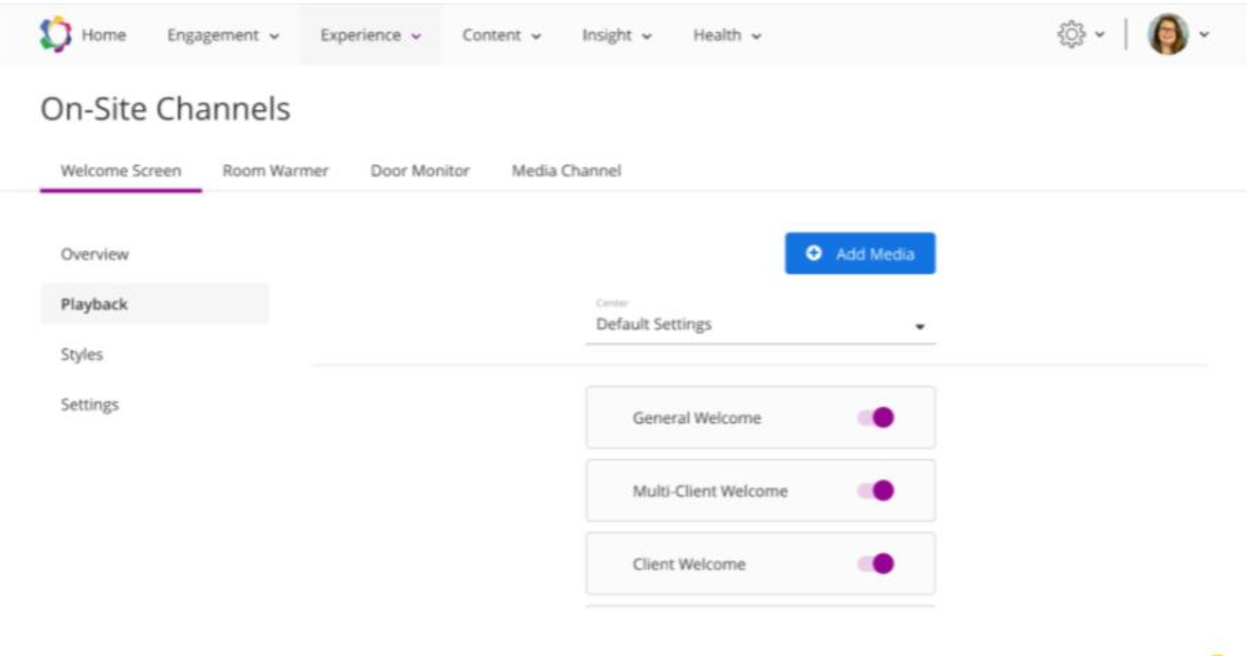


Figure 77.Playback - Core product screens

User has the following options:

- turn on/turn off one of the screens or all screens from the playback
- user turned off one of the core screens → that screen won't be shown at the Welcome Screen product
- user turned off all core screens (there are no additional downloadable media files) → user will see a black screen at the Welcome Screen product

ADD MEDIA TO THE PLAYBACK FROM THE CONTENT LIBRARY

User can select already uploaded media file (image/video) from the Content > Media menu by clicking on the ‘Add Media' button.

User can use the general options to filter media files:

5. filter media by type (image and video)
6. Users can find the needed media through existing media items in the Content Library tab with the help of the search field.

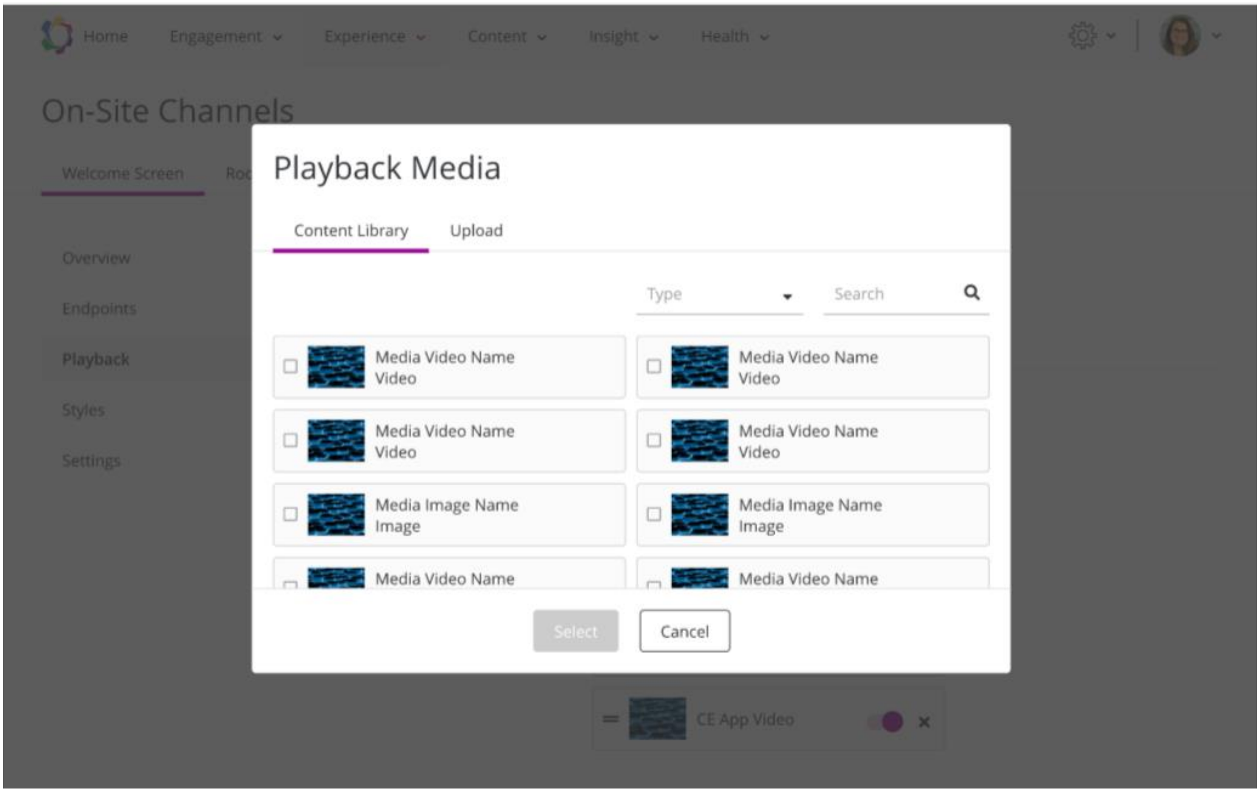


Figure 78. Add media from the Content Library menu

SELECT MEDIA FROM THE “CONTENT LIBRARY”

1. DEFAULT SETTINGS:

- The “Content Library” list will contain media files available for all centers (Center Access - ‘All’)
- Media added to playback for the "Default Setting" than that media will be available in the Playback tab for other centers in the drop-down

2. SELECT MEDIA TO THE SPECIFIC CENTER:

- User can select the needed center (for which the product has been assigned) from the drop-down

- The "Content Library" list will contain media files available only for the center selected from the drop-down (the center for media item is indicated during creation on the field 'Center Access')
- The multiple media files selection is available. User should select the checkbox near desired media
- The user cannot add a media file that already presented on the Playback list.
- After opening the "Playback Media" modal window the already added media will be shown as checked and inactive. The user cannot choose it again.

UPLOAD MEDIA DIRECTLY TO THE WELCOME SCREEN

User can select already uploaded media file (image/video) from the Content > Media menu by clicking on the 'Add Media' button.

On the Playback Media modal window, the Content Library tab should be displayed by default.

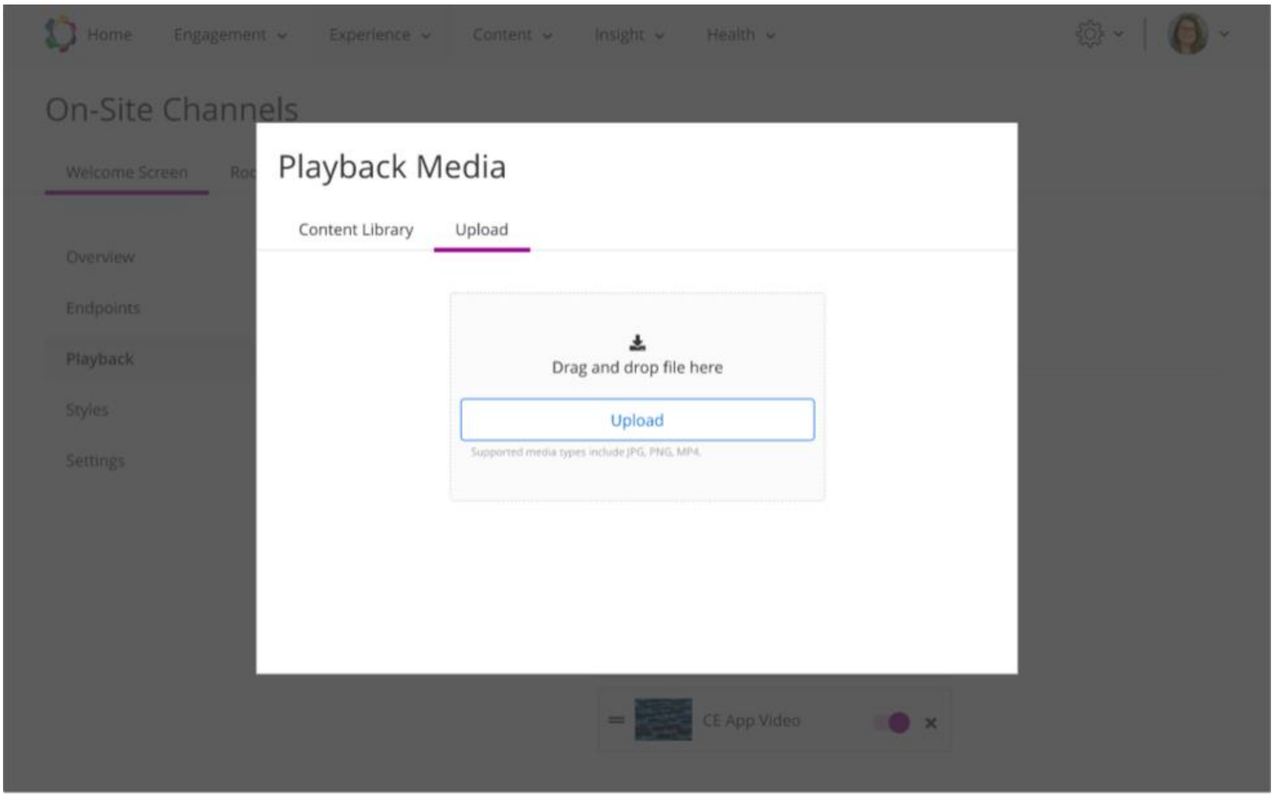


Figure 79. Direct media upload

The user can drag and drop the media to the uploading form

- Supported media types include JPG, PNG, MP4
- Max size: 2 GB
- Only one file can be uploaded at a time

Or click on the "Upload" button and select a file from the device.

Once uploaded, the user will be able to complete the media fields with the following information:

Field	Data	Validation
Media	- required - will be filled with the uploaded media - media thumbnail	Error: Media is required
Media Name	-required - freeform text field - max length: 500 symbols	- Error: Media Name is required - Uploading file (name.file_extension) exists for the current client in database.
Media Short Description	-optional - freeform text field - max length: no restrictions except the technical constrains	
Private - the private toggle will not affect any of the product **except the CE App**	-optional - "No" by the default - helper text: *Private media will be disabled from being downloaded or emailed in the CE App.*	
Industry	- required - drop-down with the list industry created - All selected by the default - multiple selection is available	- Error: Industry is required
Center	- required - drop-down with the list of Centers the user has access to: * for "Default Settings" option 'All' selected by default	- Error: Center is required

	* the center which was chosen at the “Playback” page - this center should be indicated in the field and cannot be unchecked. - multiple selection is available - the center which was chosen at the “Playback” page - this center should be indicated in the field and cannot be unchecked.	
Product	- optional - drop-down with the list of available products: * the default value will be the product for which we are uploading this media. * This will value cannot be unchecked. - The user can add also add more products. - multiple selection is available - If the Product name exceeds the dropdown width, it will ellipsis and not wrap to the next line. - this dropdown is sorted by product name alphabetically, then center name secondarily.	

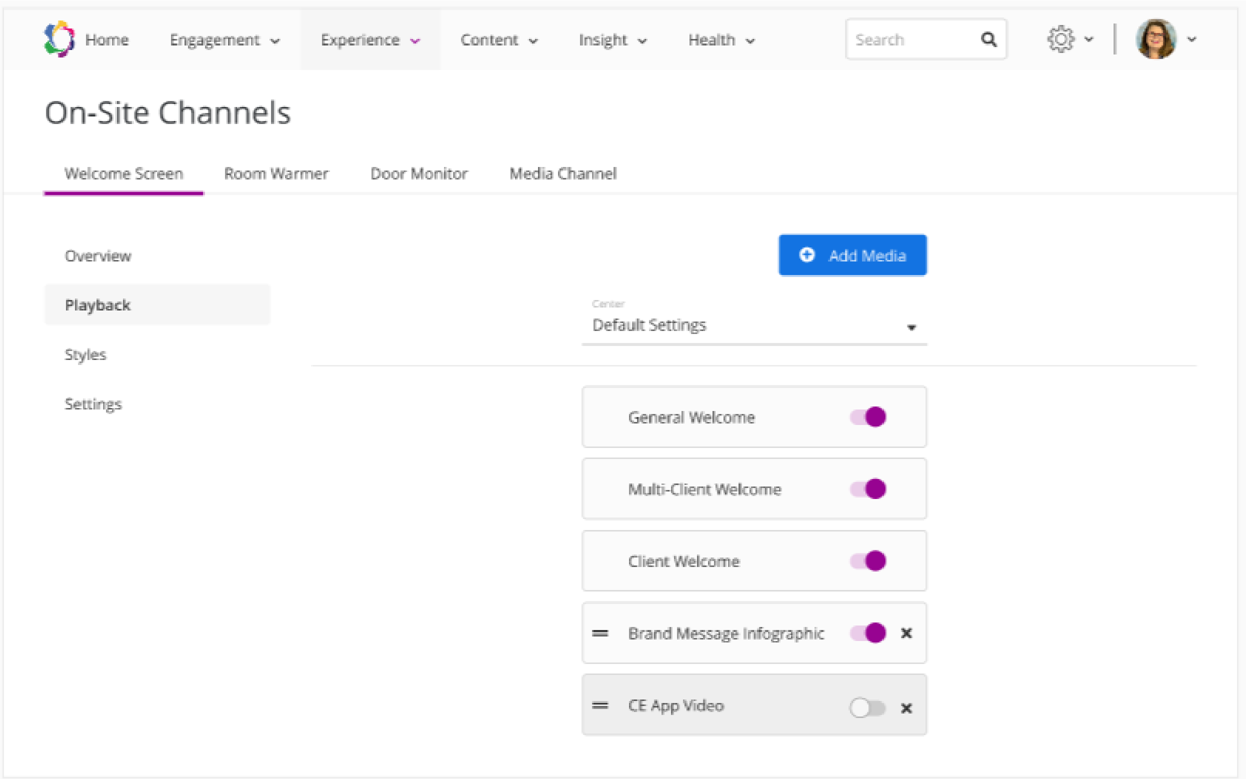


Figure 80. Playback page with additional media

8.3.1.3. STYLES

Path: *Experiences > On-Site Channels > Welcome Screen > Style tab*

On the "Styles" page user can setup the visual representation of Welcome Screen product.

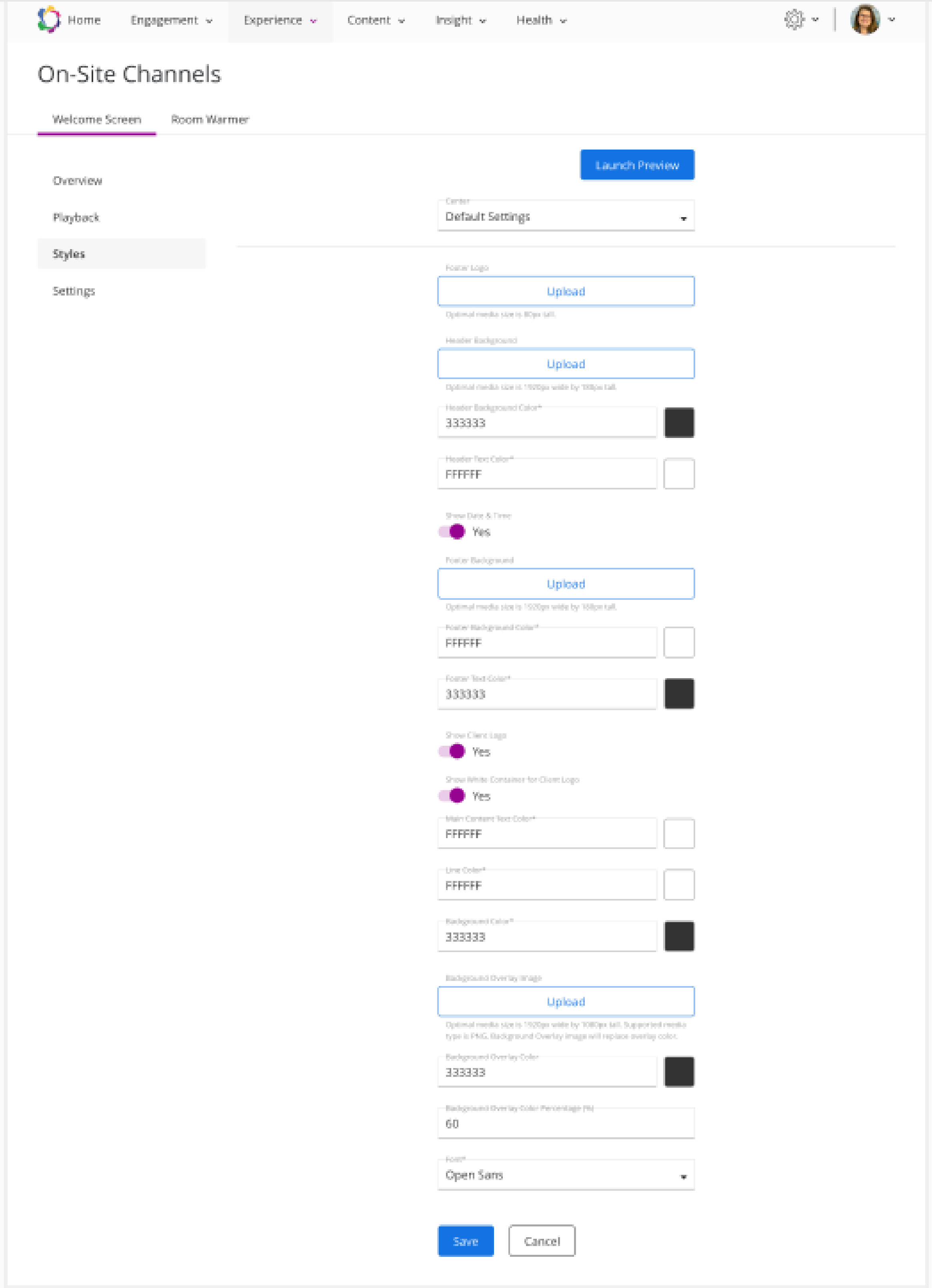


Figure 81. Welcome Screen - Styles page

The Default Settings should be shown on the Style page for each center.

When the user makes changes with Default Settings it should be applied to all Centers on the drop-down.

Field	Data
Footer Logo	1. Optional 2. Upload button 3. Max image size: 5Gb 4. File type: JPG, JPEG, PNG 5. Optimal media size is 60px tall
Header Background	1. Optional 2. Upload button 3. File format: JPG, JPEG, PNG 4. Max file size: 5 GB 5. Optimal media size is 1400px wide and 1000px tall
Header Background Color (new field)	1. Required 2. HEX code #333333 is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Header Background Color is required
Header Text Color	1. Required 2. HEX code #FFFFFF is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Header Text Color is required
Footer Background	1. Optional 2. Upload button 3. File format: JPG, JPEG, PNG 4. Max file size: 5 GB 5. Optimal media size is 1400px wide and 1000px tall
Footer Background Color (new field)	1. Required 2. HEX code #FFFFFF is set by default 3. Freeform text field

	4. Max length: 9 characters 5. Error message: Footer Background Color is required
Footer Text Color	1. Required 2. HEX code #333333 is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Footer Text Color is required
Show Client Logo toggle (new field)	1. Optional 2. Toggle with options – ON/OFF 3. ON is set by default
Show Logo Background White Container toggle (new field)	1. Optional 2. Toggle with options – ON/OFF 3. ON is set by default
Main Content Text Color	1. Required 2. HEX code #FFFFFF is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Main Content Text Color is required
Line Color	1. Required 2. HEX code #333333 is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Line Color is required
Background Color	1. Optional 2. Freeform text field 3. HEX color code: #333333 by default 4. Max length: 9 characters
Background Overlay Image	1. Optional 2. Upload button 3. Max image size: 5Gb 4. File type: PNG 5. Optimal media size is 1920px wide by 1080px tall. 6. Background Overlay image will replace overlay color

Background Overlay Color	1. Optional 2. Freeform text field 3. HEX color code: #333333 by default 4. Max length: 9 characters
Background Overlay Color Opacity Percentage	1. Optional 2. Freeform text field 4. Value "30" is set by default 5. Max length: 3 characters 6. Only numbers
Font	1. Required 2. Drop-down 3. Open Sans is set by default

LAUNCH PREVIEW

From the "Styles" page user can also launch Welcome Screen product preview.

Clicking on the 'Launch Preview' button user will see a sample of product in a new browser tab.

User should see the 'Welcome Screen' product preview with the following information:

- Product will be launch to the user current default center
- Welcome Screen will be displayed with default Settings and Styles options
- For Multi-Client screen will be displayed the list of sample briefings (Briefing Date == current date)

The 'Welcome Screen' product should be displayed in full-screen mode (Not F11 like full screen, just feet the app to the size of the page)

8.3.1.4. SETTINGS

On the “Settings” page user can setup settings which will be manage the Welcome Screen work.

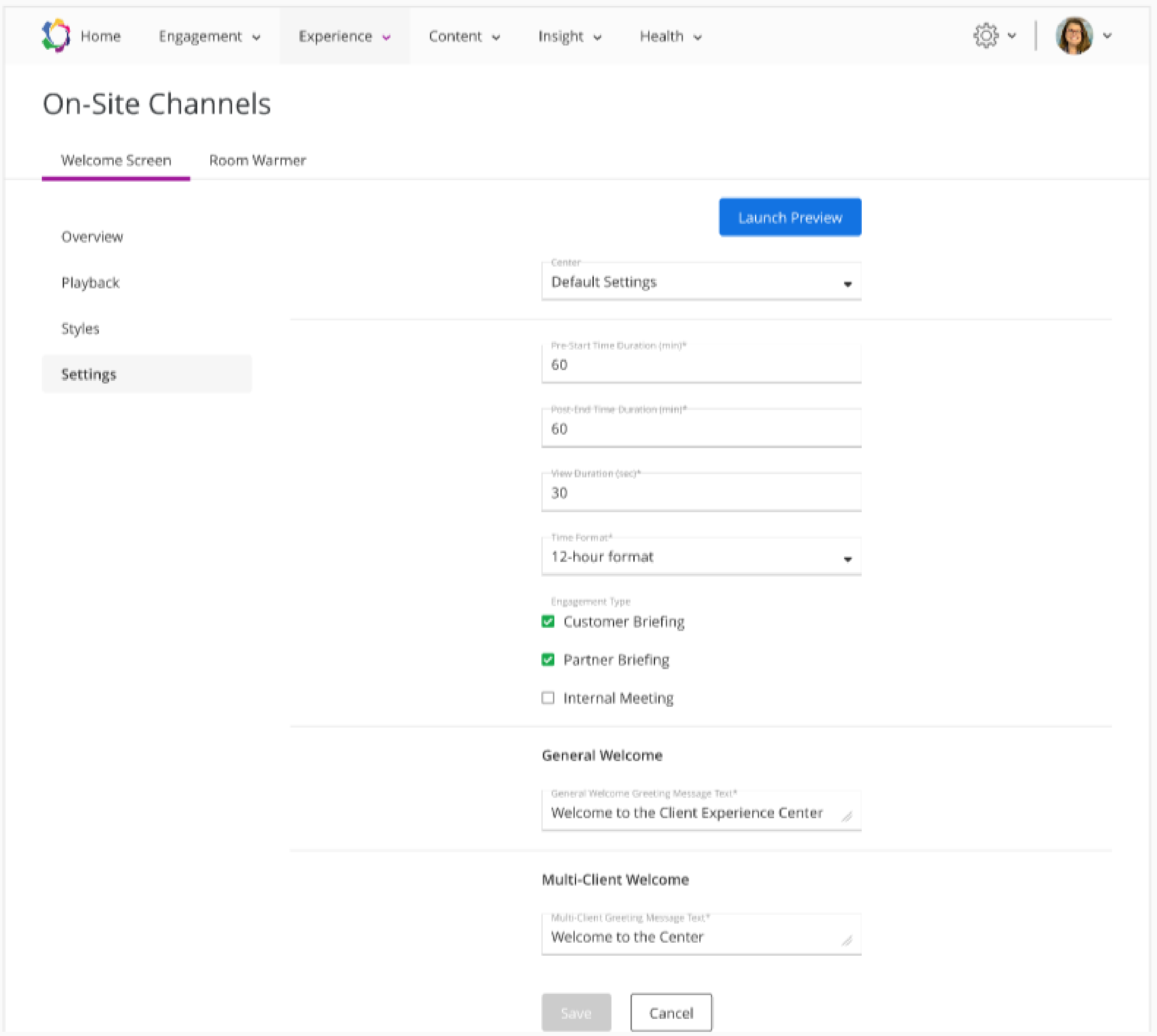


Figure 82. Welcome Screen - Settings page

The Default Settings should be shown on the Style page for each center.

When the user makes changes with Default Settings it should be applied to all Centers on the drop-down.

Field	Data
Pre-Start Time Duration (min)	1. Required 2. Freeform text field 3. 60 min is set by default 4. Only numbers

	5. Max length: 3 characters 6. Error: Pre-Start Time Duration is required
Post-End Time Duration (min)	1. Required 2. Freeform text field 3. 60 min is set by default 4. Only numbers 5. Max length: 3 characters 6. Error: Pre-Start Time Duration is required
View Duration (sec)	1. Required 2. Freeform text field 3. 30 sec is set by default 4. Only numbers 5. Max length: 3 characters 6. Error: Pre-Start Time Duration is required
Show Date & Time toggle	1. Optional 2. Toggle set to Yes/On by default
Engagement Type	1. Optional 2. List of engagement types from Settings – Programs – Briefing Types 3. Customer and Partner engagement types selected by default 4. User can uncheck all checkboxes. In that case, the user will see only the General Welcome screen.
General Welcome section with General Welcome Greeting Message Text	1. Required 2. Freeform text field 3. Max length: 2000 symbols 4. 'Welcome to the Client Experience Center' text is by default 5. Error: General Welcome Greeting Message Text is required
Multi-Client Welcome section with Multi-Client Welcome Greeting Message Text	1. Required 2. Freeform text field 3. Max length: 2000 symbols 4. 'Welcome to the Center' text is by default

	5. Error: Multi-Client Welcome Greeting Message Text is required

LAUNCH PREVIEW

From the “Styles” page user can also launch Welcome Screen product preview.

Clicking on the ‘Launch Preview’ button user will see a sample of product in a new browser tab.

User should see the ‘Welcome Screen’ product preview with the following information:

- Product will be launch to the user current default center
- Welcome Screen will be displayed with default Settings and Styles options
- For Multi-Client screen will be displayed the list of sample briefings (Briefing Date == current date)

The ‘Welcome Screen’ product should be displayed in full-screen mode (Not F11 like full screen, just feet the app to the size of the page)

8.3.2. ROOM WARMER

NOTES:

1. The "Default Settings" will be available only for users who have access to **ALL** centers that belong to a tenant.

2. In case the user has access only to several of the centers that belong to a tenant than on the following pages (Playback, Styles, Settings) in the Center drop-down they will see only those centers and without the "Default Settings".

8.3.2.1. OVERVIEW

The first tab where user navigates from Experience – On-Site Channels – Overview page. On this page user can see a static information about the product.

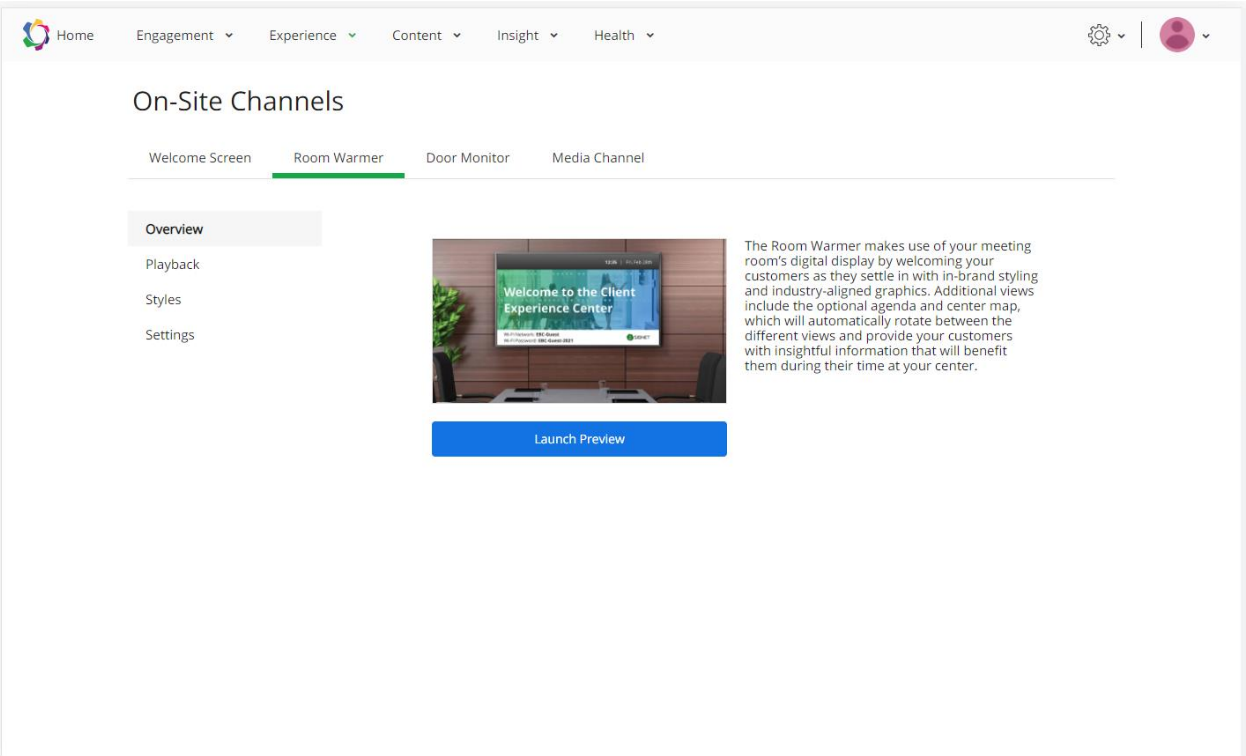


Figure 83. Room Warmer product Overview page

LAUNCH PREVIEW

Clicking on the 'Launch Preview' button user will see a sample of product in a new browser tab.

User should see the 'Room Warmer" product preview with the following information:

- Product will be launch to the user current default center
- Room Warmer will be displayed with default Settings and Styles options

The 'Room Warmer' product should be displayed in full-screen mode (Not F11 like full screen, just feet the app to the size of the page)

8.3.2.2. PLAYBACK

In the Playback page user can see a list of the core product screens – General Welcome, Client Welcome, Agenda.

The core product screens are the same for all Centers.

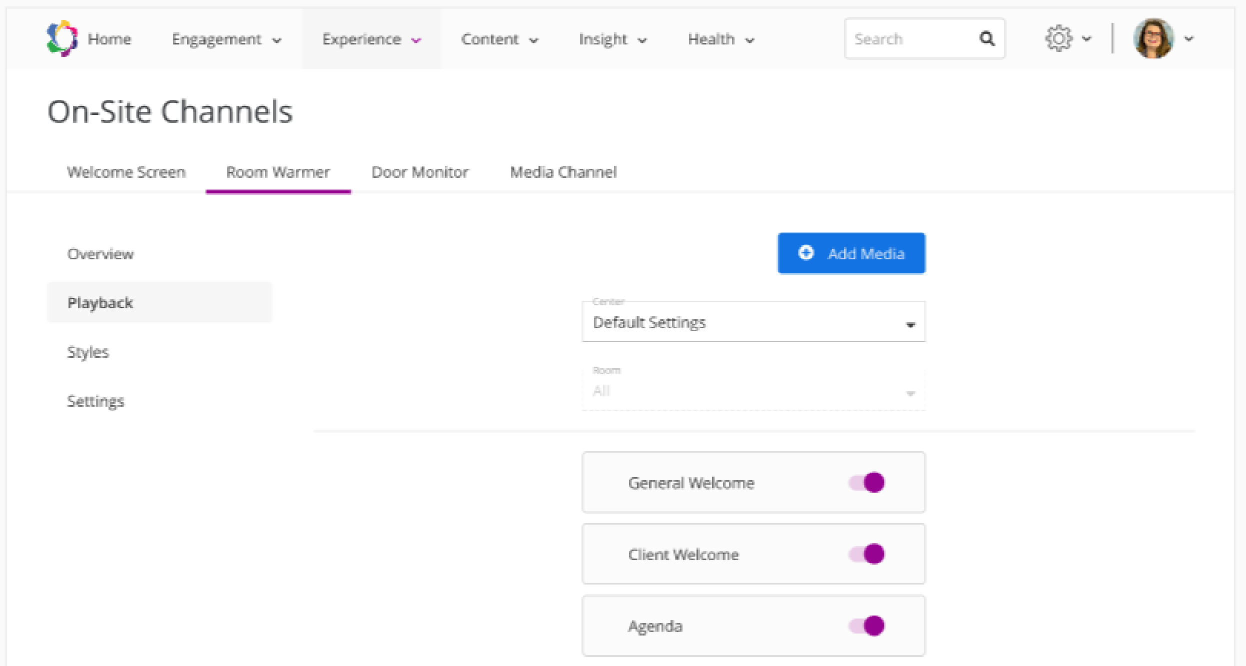


Figure 84.Playback - Core product screens

User has the following options:

- turn on/turn off one of the screens or all screens from the playback
- user turned off one of the core screens → that screen won't be shown at the Welcome Screen product
- user turned off all core screens (there are no additional downloadable media files) → user will see a black screen at the Welcome Screen product

ADD MEDIA TO THE PLAYBACK FROM THE CONTENT LIBRARY

User can select already uploaded media file (image/video) from the Content > Media menu by clicking on the 'Add Media' button.

User can use the general options to filter media files:

7. filter media by type (image and video)
8. Users can find the needed media through existing media items in the Content Library tab with the help of the search field.

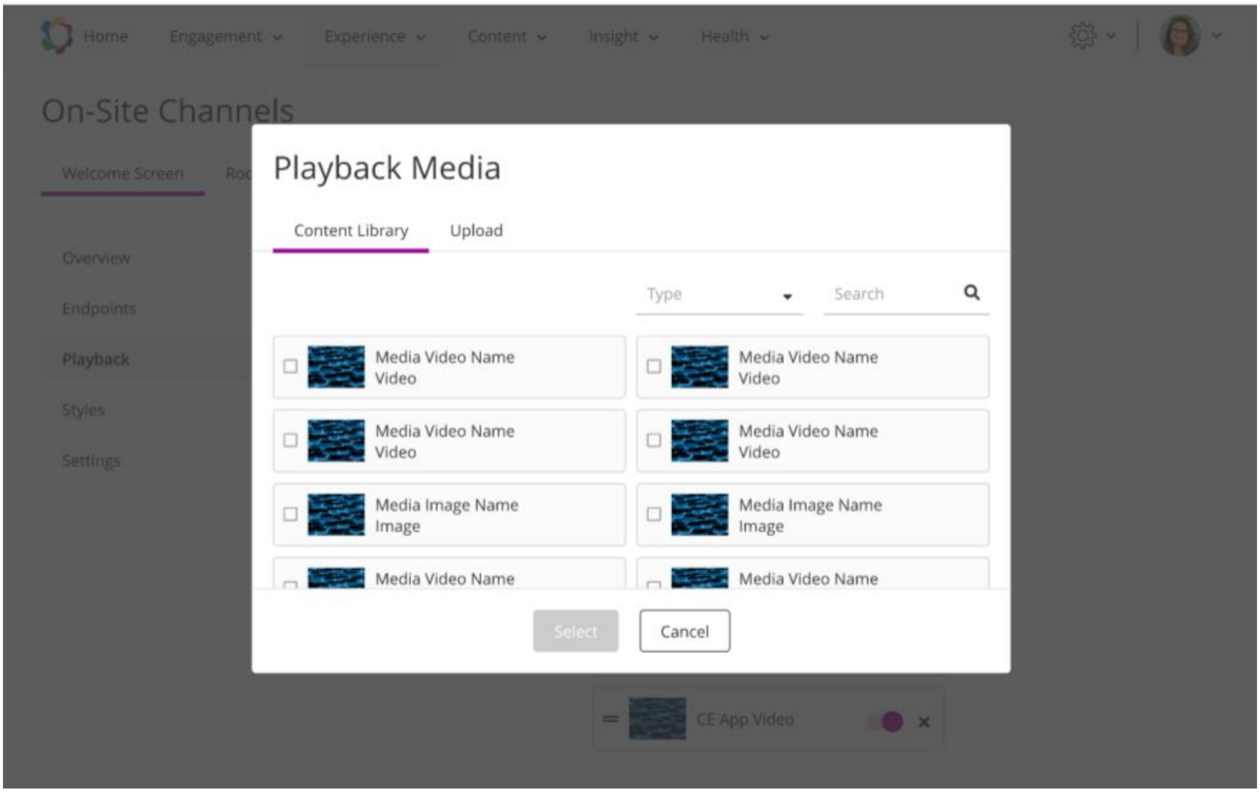


Figure 85. Add media from the Content Library menu

SELECT MEDIA FROM THE "CONTENT LIBRARY"

1. DEFAULT SETTINGS:

- The "Content Library" list will contain media files available for all centers (Center Access - 'All')
- Media added to playback for the "Default Setting" than that media will be available in the Playback tab for other centers in the drop-down

2. SELECT MEDIA TO THE SPECIFIC CENTER:

- User can select the needed center (for which the product has been assigned) from the drop-down
- The "Content Library" list will contain media files available only for the center selected from the drop-down (the center for media item is indicated during creation on the field 'Center Access')
- The multiple media files selection is available. User should select the checkbox near desired media
- The user cannot add a media file that already presented on the Playback list.
- After opening the "Playback Media" modal window the already added media will be shown as checked and inactive. The user cannot choose it again.

UPLOAD MEDIA DIRECTLY TO THE WELCOME SCREEN

User can select already uploaded media file (image/video) from the Content > Media menu by clicking on the 'Add Media' button.

On the Playback Media modal window, the Content Library tab should be displayed by default.

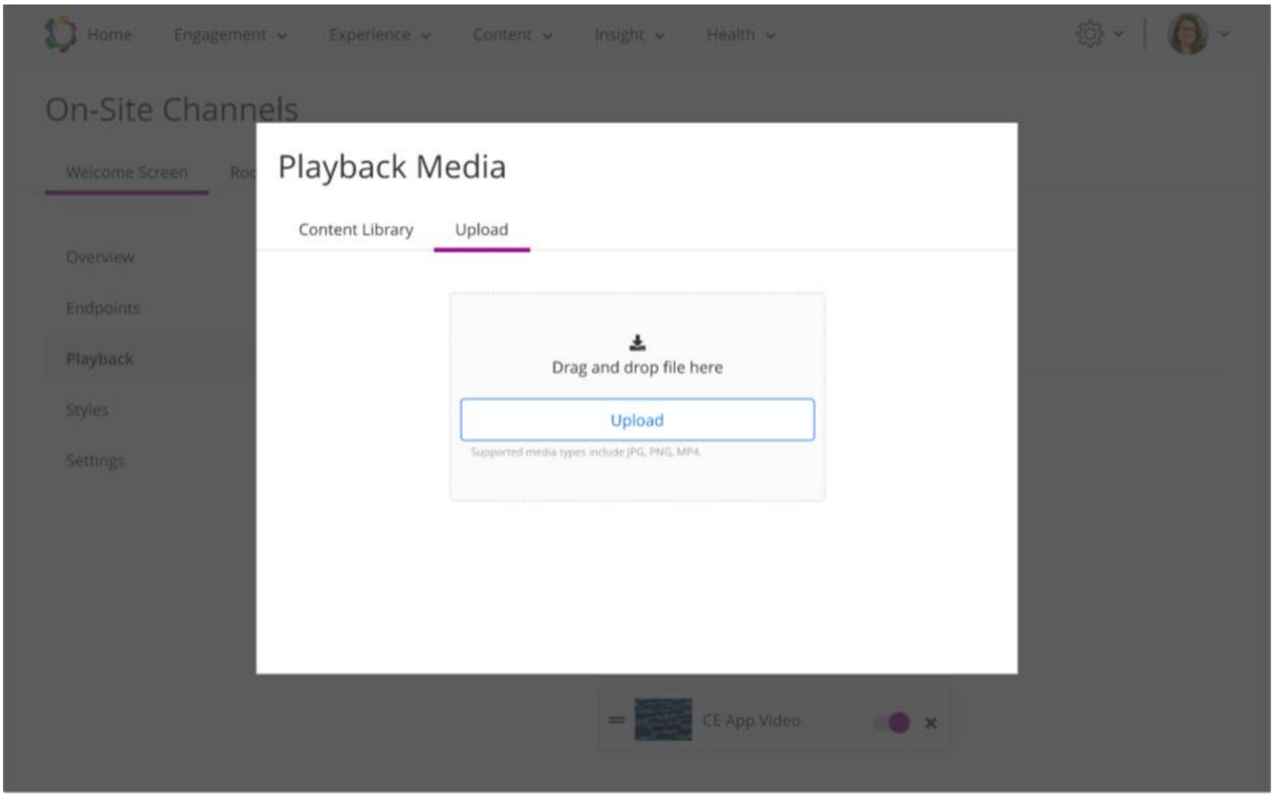


Figure 86. Direct media upload

The user can drag and drop the media to the uploading form

- Supported media types include JPG, PNG, MP4
- Max size: 2 GB
- Only one file can be uploaded at a time

Or click on the "Upload" button and select a file from the device.

Once uploaded, the user will be able to complete the media fields with the following information:

Field	Data	Validation
Media	- required - will be filled with the uploaded media - media thumbnail	Error: Media is required

Media Name	-required - freeform text field - max length: 500 symbols	- Error: Media Name is required - Uploading file (name.file_extension) exists for the current client in database.
Media Short Description	-optional - freeform text field - max length: no restrictions except the technical constrains	
Private - the private toggle will not affect any of the product **except the CE App**	-optional - "No" by the default - helper text: *Private media will be disabled from being downloaded or emailed in the CE App.*	
Industry	- required - drop-down with the list industry created - All selected by the default - multiple selection is available	- Error: Industry is required
Center	- required - drop-down with the list of Centers the user has access to: * for "Default Settings" option 'All' selected by default * the center which was chosen at the "Playback" page - this center should be indicated in the field and cannot be unchecked. - multiple selection is available - the center which was chosen at the "Playback" page - this center	- Error: Center is required

	should be indicated in the field and cannot be unchecked.	
Product	- optional - drop-down with the list of available products: * the default value will be the product for which we are uploading this media. * This will value cannot be unchecked. - The user can add also add more products. - multiple selection is available - If the Product name exceeds the dropdown width, it will ellipsis and not wrap to the next line. - this dropdown is sorted by product name alphabetically, then center name secondarily.	

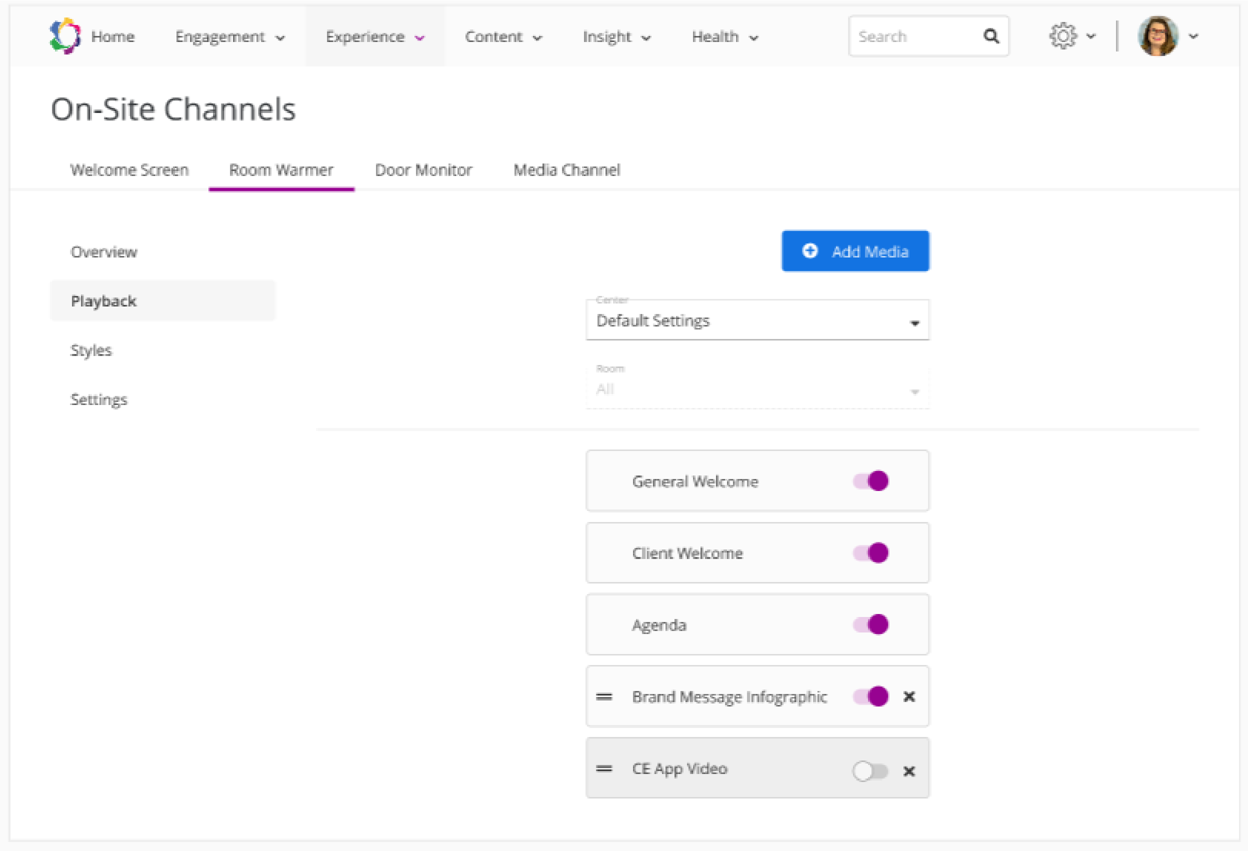


Figure 87. Playback page with additional media

8.3.3.3. STYLES

Path: *Experiences > On-Site Channels > Room Warmer > Style tab*

On the “Styles” page user can setup the visual representation of Room Warmer product.

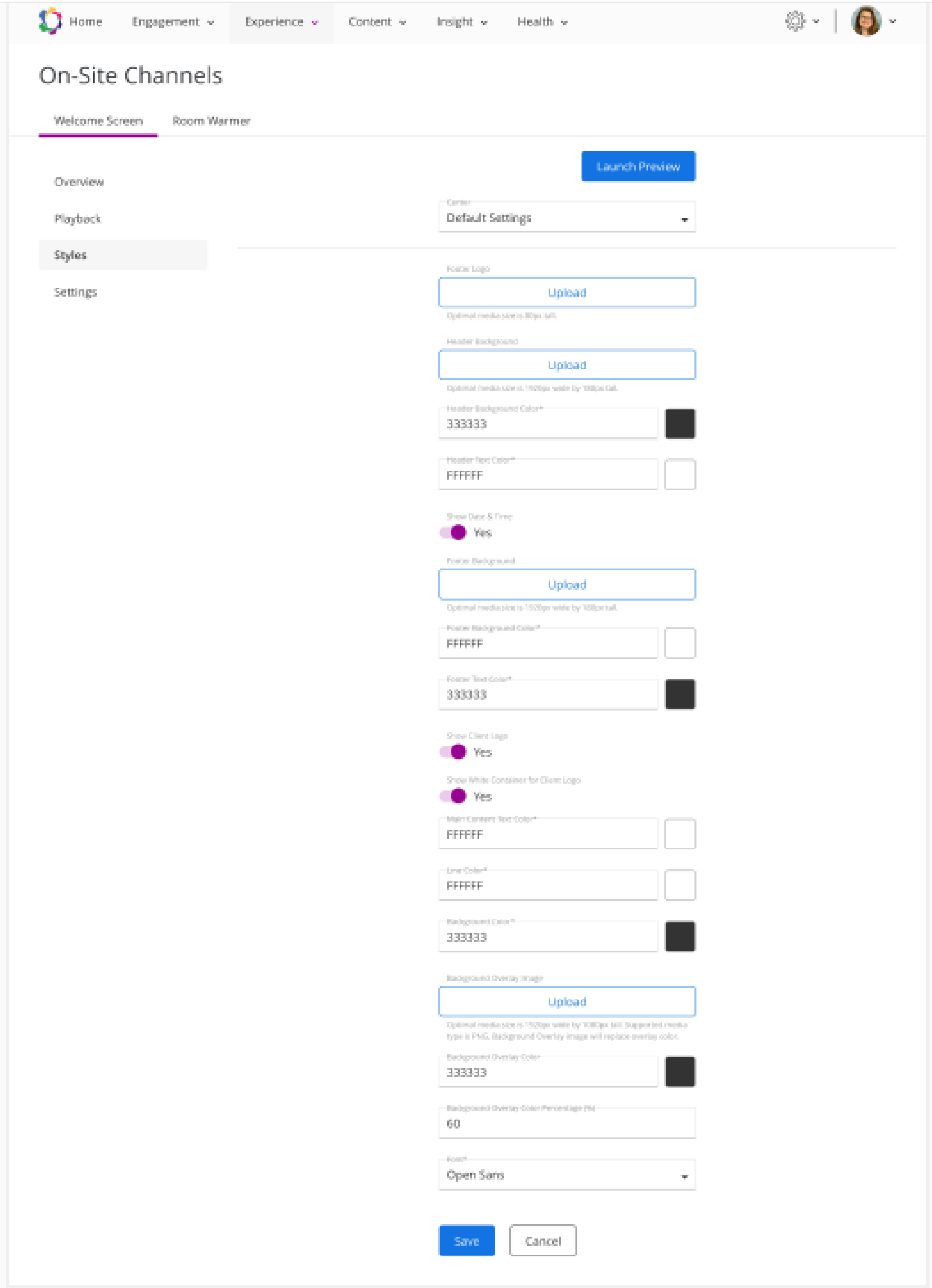


Figure 88. Room Warmer - Styles page

The Default Settings should be shown on the Style page for each center.

When the user makes changes with Default Settings it should be applied to all Centers on the drop-down.

Field	Data
Center and Room drop-downs	1. User can manage the styles for the specific room
Footer Logo	1. Optional 2. Upload button 3. Max image size: 5Gb 4. File type: JPG, JPEG, PNG 5. Optimal media size is 60px tall
Header Background	1. Optional 2. Upload button 3. File format: JPG, JPEG, PNG 4. Max file size: 5 GB 5. Optimal media size is 1400px wide and 1000px tall
Header Background Color (new field)	1. Required 2. HEX code #333333 is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Header Background Color is required
Header Text Color	1. Required 2. HEX code #FFFFFF is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Header Text Color is required
Footer Background	1. Optional 2. Upload button 3. File format: JPG, JPEG, PNG 4. Max file size: 5 GB 5. Optimal media size is 1400px wide and 1000px tall
Footer Background Color (new field)	1. Required 2. HEX code #FFFFFF is set by default

	3. Freeform text field 4. Max length: 9 characters 5. Error message: Footer Background Color is required
Footer Text Color	1. Required 2. HEX code #333333 is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Footer Text Color is required
Show Client Logo toggle (new field)	1. Optional 2. Toggle with options – ON/OFF 3. ON is set by default
Show Logo Background White Container toggle (new field)	1. Optional 2. Toggle with options – ON/OFF 3. ON is set by default
Main Content Text Color	1. Required 2. HEX code #FFFFFF is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Main Content Text Color is required
Line Color	1. Required 2. HEX code #333333 is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Line Color is required
Background Color	1. Optional 2. Freeform text field 3. HEX color code: #333333 by default 4. Max length: 9 characters
Background Overlay Image	1. Optional 2. Upload button 3. Max image size: 5Gb 4. File type: PNG 5. Optimal media size is 1920px wide by 1080px tall. 6. Background Overlay image will replace overlay color

Background Overlay Color	1. Optional 2. Freeform text field 3. HEX color code: #333333 by default 4. Max length: 9 characters
Background Overlay Color Opacity Percentage	1. Optional 2. Freeform text field 4. Value “30” is set by default 5. Max length: 3 characters 6. Only numbers
Font	1. Required 2. Drop-down 3. Open Sans is set by default

LAUNCH PREVIEW

From the “Styles” page user can also launch Room Warmer product preview.

Clicking on the ‘Launch Preview’ button user will see a sample of product in a new browser tab.

User should see the ‘Room Warmer’ product preview with the following information:

- Product will be launch to the user current default center
- Room Warmer will be displayed with default Settings and Styles options

The ‘Room Warmer’ product should be displayed in full-screen mode (Not F11 like full screen, just feet the app to the size of the page)

8.3.3.4. SETTINGS

On the "Settings" page user can setup settings which will be manage the Room Warmer work.

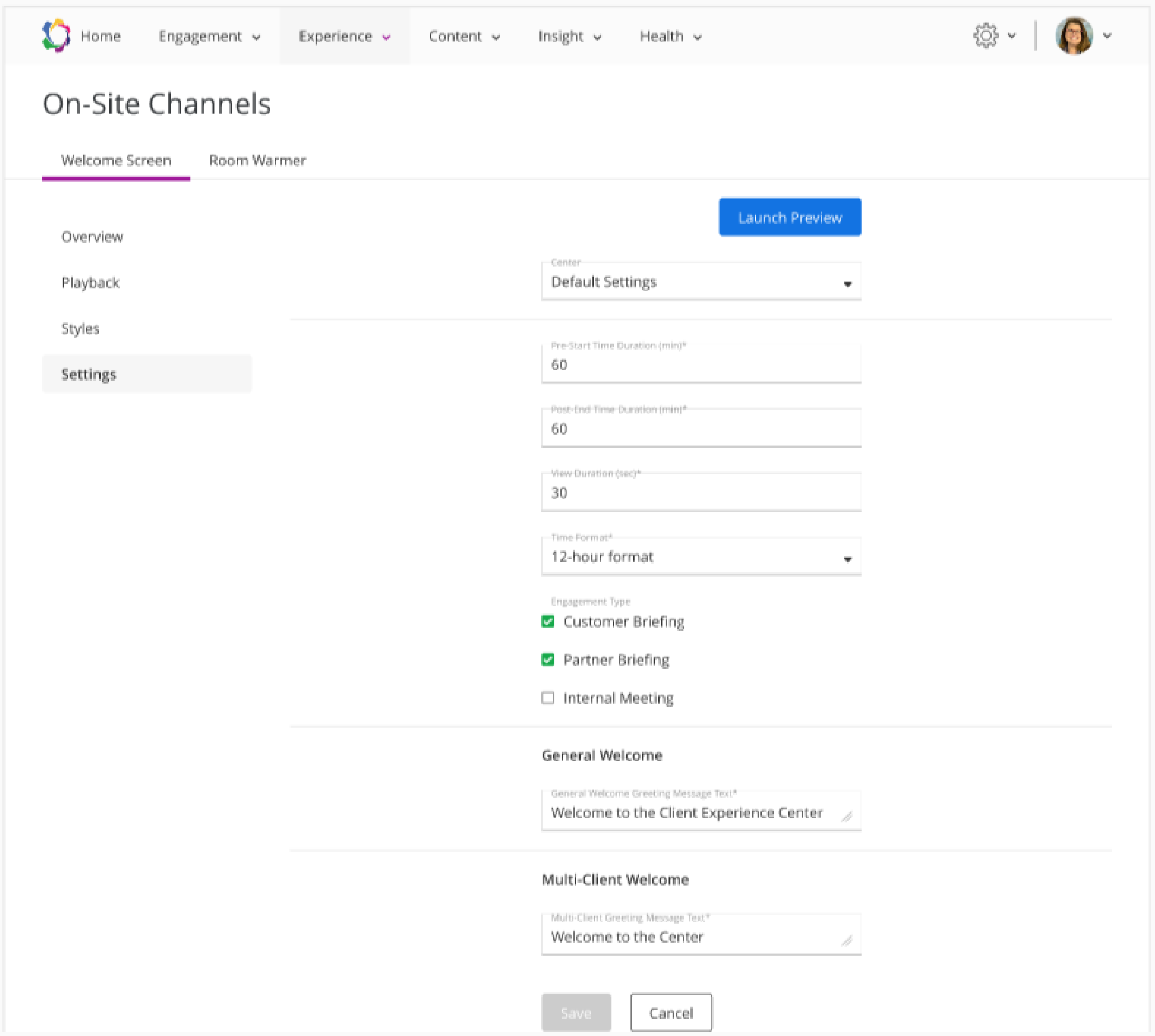


Figure 89. Welcome Screen - Settings page

The Default Settings should be shown on the Style page for each center.

When the user makes changes with Default Settings it should be applied to all Centers on the drop-down.

Field	Data
Center and Room drop-downs	1.User can manage the settings for the specific room
Pre-Start Time Duration (min)	1. Required 2. Freeform text field

	3. 60 min is set by default 4. Only numbers 5. Max length: 3 characters 6. Error: Pre-Start Time Duration is required
Post-End Time Duration (min)	1. Required 2. Freeform text field 3. 60 min is set by default 4. Only numbers 5. Max length: 3 characters 6. Error: Pre-Start Time Duration is required
View Duration (sec)	1. Required 2. Freeform text field 3. 30 sec is set by default 4. Only numbers 5. Max length: 3 characters 6. Error: Pre-Start Time Duration is required
Show Date & Time toggle	1. Optional 2. Toggle set to Yes/On by default
Engagement Type	1. Optional 2. List of engagement types from Settings – Programs – Briefing Types 3. Customer and Partner engagement types selected by default 4. User can uncheck all checkboxes. In that case, the user will see only the General Welcome screen.
General Welcome section	
General Welcome Greeting Message Text	1. Required 2. Freeform text field 3. Max length: 2000 symbols 4. 'Welcome to the Client Experience Center' text is by default 5. Error: General Welcome Greeting Message Text is required

Footer Line 1 Label	1. Optional 2. Freeform text field 3. Max length: 20 symbols 4. ‘Wi-Fi Network’ text is by default
Footer Line 1 Value	1. Optional 2. Freeform text field 3. Max length: 20 symbols
Footer Line 2 Label	1. Optional 2. Freeform text field 3. Max length: 20 symbols 4. ‘Wi-Fi Password’ text is by default
Footer Line 2 Value	1. Optional 2. Freeform text field 3. Max length: 20 symbols
Agenda section	
Time Column Label	1. Required 2. Freeform text field 3. Max length: 20 symbols 4. ‘Time’ text is by default 5. Error: Time Column Label is required
Agenda Column Label	1. Required 2. Freeform text field 3. Max length: 20 symbols 4. ‘Time’ text is by default 5. Error: Agenda Column Label is required
Speaker Column Label	1. Required 2. Freeform text field 3. Max length: 20 symbols 4. ‘Time’ text is by default 5. Error: Speaker Column Label is required

LAUNCH PREVIEW

From the ”Styles” page user can also launch Room Warmer product preview.

Clicking on the ‘Launch Preview’ button user will see a sample of product in a new browser tab.

User should see the ‘Room Warmer’ product preview with the following information:

- Product will be launch to the user current default center
- Room Warmer will be displayed with default Settings and Styles options

The ‘Room Warmer’ product should be displayed in full-screen mode (Not F11 like full screen, just feet the app to the size of the page)

8.3.3. DOOR MONITOR

NOTES:

1. The “Default Settings” will be available only for users who have access to **ALL** centers that belong to a tenant.

2. In case the user has access only to several of the centers that belong to a tenant than on the following pages (Styles, Settings) in the Center drop-down they will see only those centers and without the "Default Settings".

8.3.3.1. OVERVIEW

The first tab where user navigates from Experience – On-Site Channels – Door Monitor - Overview page. On this page user can see a static information about the product.

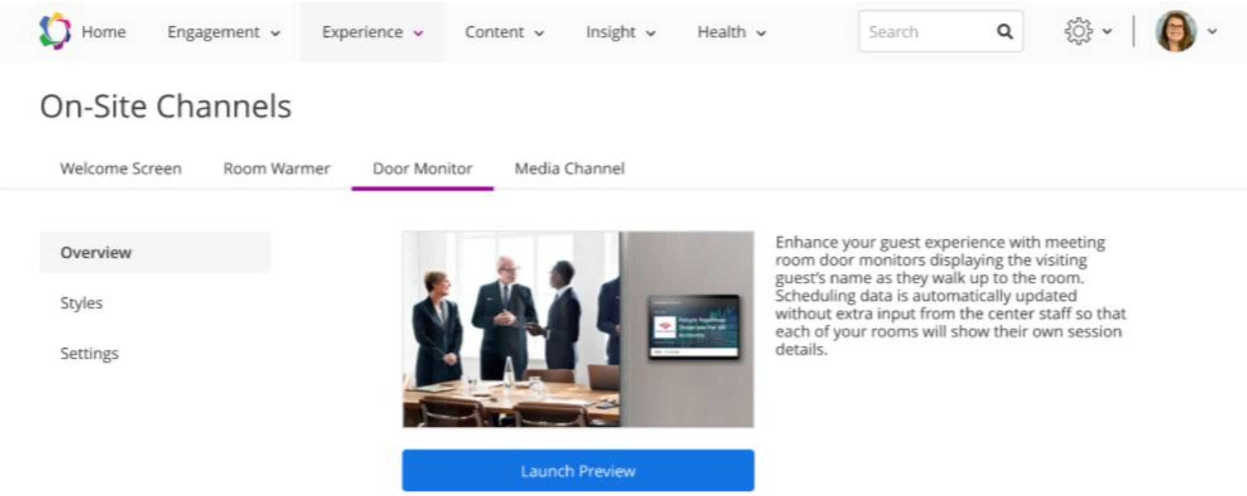


Figure 90. Door Monitor product Overview page

LAUNCH PREVIEW

Clicking on the ‘Launch Preview’ button user will see a sample of product in a new browser tab.

User should see the ‘Door Monitor’ product preview with the following information:

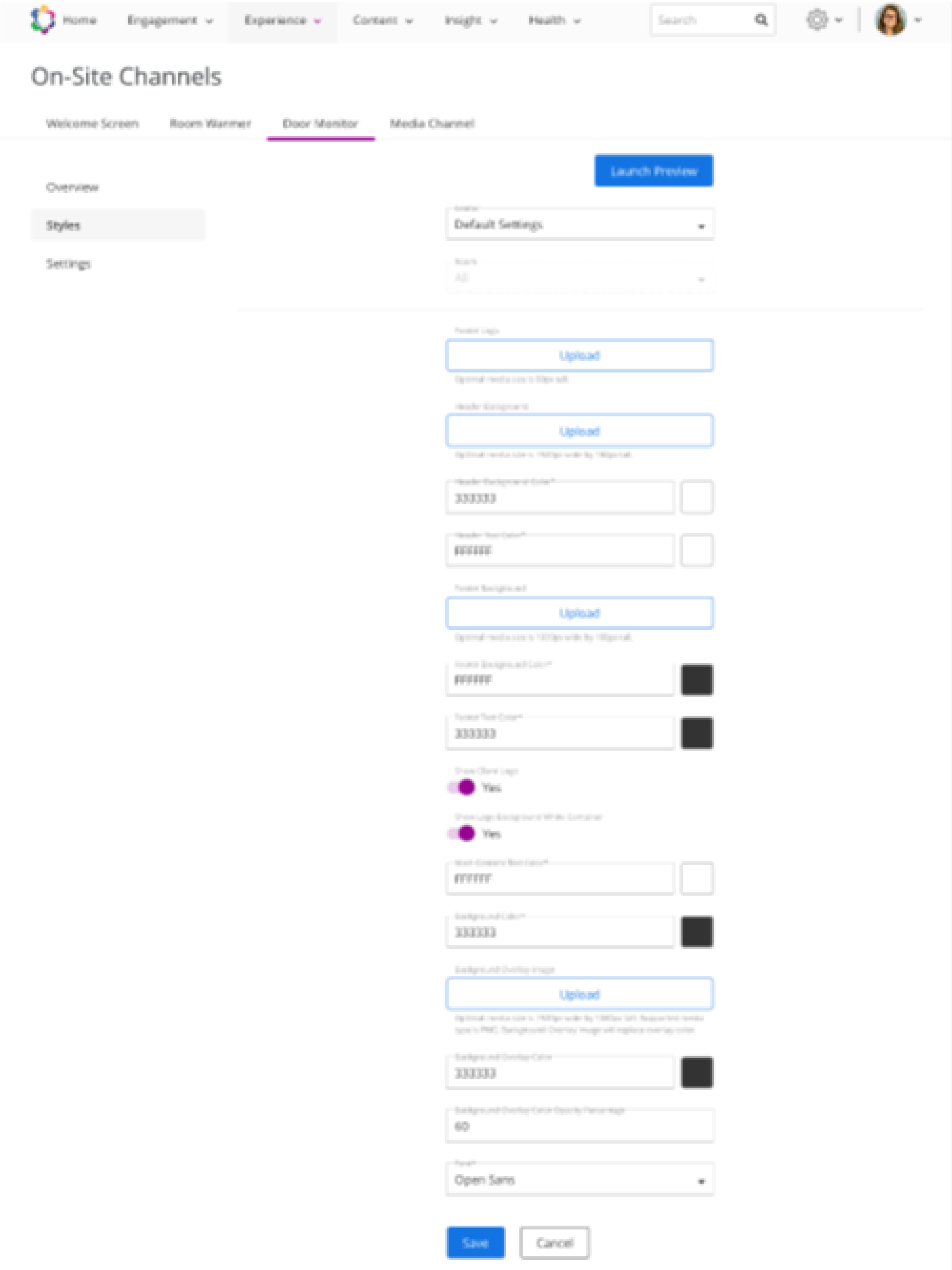
- Product will be launch to the user current default center
- Door Monitor will be displayed with default Settings and Styles options

The ‘Door Monitor’ product should be displayed in full-screen mode (Not F11 like full screen, just feet the app to the size of the page)

3.3.3.2. STYLES

Path: *Experiences > On-Site Channels > Door Monitor > Style tab*

On the “Styles” page user can setup the visual representation of Door Monitor product.



The Default Settings should be shown on the Style page for each center. The user can also set the styles per the specific room of the Center.

When the user makes changes with Default Settings it should be applied to all Centers on the drop-down.

Field	Data
Footer Logo	1. Optional 2. Upload button 3. Max image size: 5Gb 4. File type: JPG, JPEG, PNG 5. Optimal media size is 80px tall
Header Background	1. Optional 2. Upload button 3. File format: JPG, JPEG, PNG 4. Max file size: 5 GB 5. Optimal media size is 1920px wide and 180px tall
Header Background Color	1. Required 2. HEX code #333333 is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Header Background Color is required
Header Text Color	1. Required 2. HEX code #FFFFFF is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Header Text Color is required
Footer Background	1. Optional 2. Upload button 3. File format: JPG, JPEG, PNG 4. Max file size: 5 GB 5. Optimal media size is 1400px wide and 1000px tall
Footer Background Color	1. Required 2. HEX code #FFFFFF is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Footer Background Color is required
Footer Text Color	1. Required 2. HEX code #333333 is set by default 3. Freeform text field

	4. Max length: 9 characters 5. Error message: Footer Text Color is required
Show Client Logo	1. Optional 2. Default value is “On”.
Show Logo Background White Container	1. Optional 2. Default value is “On”.
Main Content Text Color	1. Required 2. HEX code #FFFFFF is set by default 3. Freeform text field 4. Max length: 9 characters 5. Error message: Main Content Text Color is required
Background Color	1. Optional 2. Freeform text field 3. HEX color code: #333333 by default 4. Max length: 9 characters
Background Overlay Image	1. Optional 2. Upload button 3. Max image size: 5Gb 4. File type: PNG 5. Optimal media size is 1920px wide by 1080px tall. 6. Background Overlay image will replace overlay color
Background Overlay Color	1. Optional 2. Freeform text field 3. HEX color code: #333333 by default 4. Max length: 9 characters
Background Overlay Color Opacity Percentage	1. Optional 2. Freeform text field 4. Value “30” is set by default 5. Max length: 3 characters 6. Only numbers
Font	1. Required 2. Drop-down 3. Open Sans is set by default

LAUNCH PREVIEW

From the “Styles” page user can also launch Door Monitor product preview.

Clicking on the ‘Launch Preview’ button user will see a sample of product in a new browser tab.

The Door Monitor will be launched with the set styles. If the user will change any of the styles on the default settings or per specific center – it will be applied on the preview.

The ‘Door Monitor’ product should be displayed in full-screen mode (Not F11 like full screen, just feet the app to the size of the page)

3.3.3.3. SETTINGS

On the “Settings” page user can setup settings which will be manage the Door Monitor work.

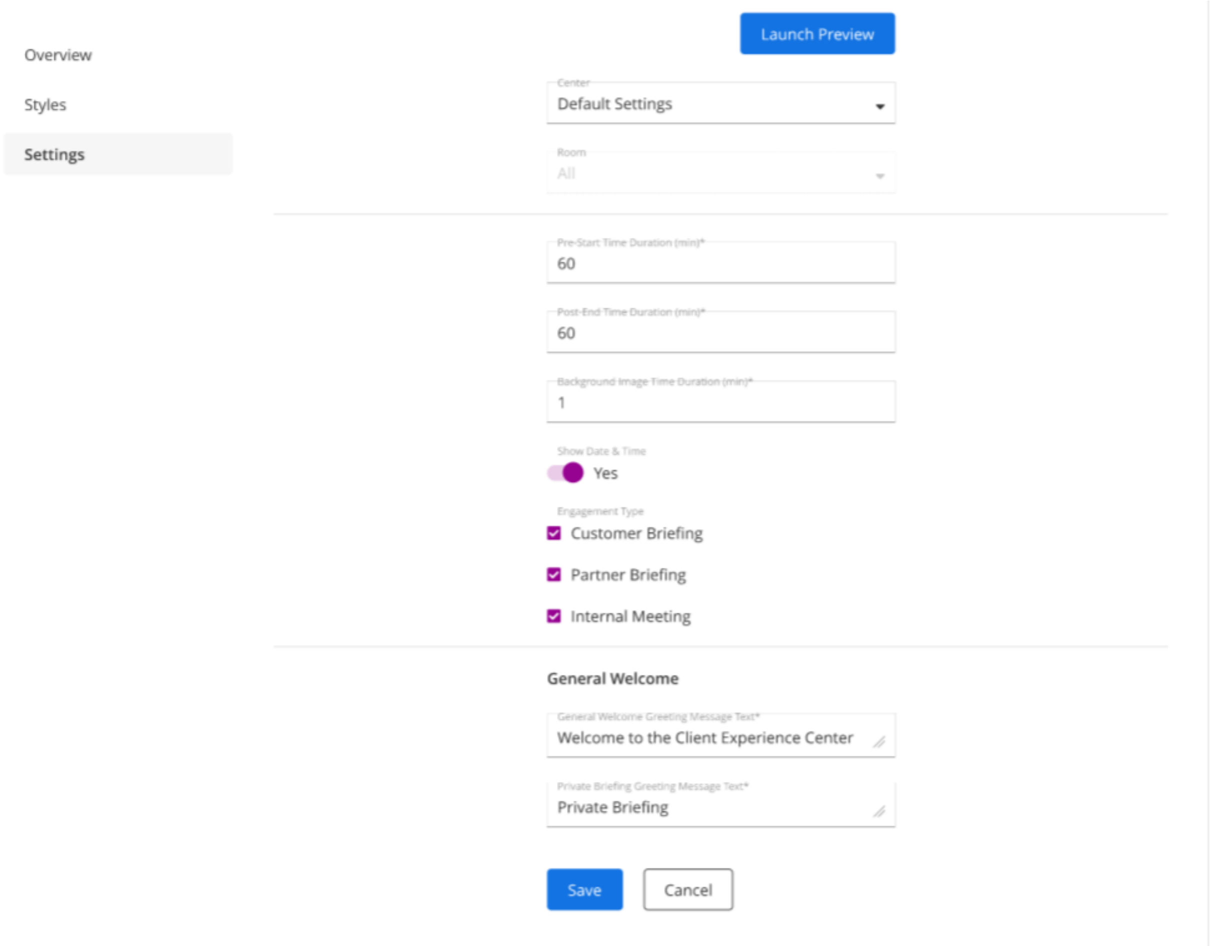


Figure 91. Door Monitor - Settings

The Default Settings should be shown on the Settings page for each center. The user can also set the styles per the specific room of the Center.

When the user makes changes with Default Settings it should be applied to all Centers on the drop-down.

Field	Data
Pre-Start Time Duration (min)	1. Required 2. Freeform text field 3. 60 min is set by default 4. Only numbers 5. Max length: 3 characters 6. Error: Pre-Start Time Duration is required
Post-End Time Duration (min)	1. Required 2. Freeform text field 3. 60 min is set by default 4. Only numbers 5. Max length: 3 characters 6. Error: Pre-Start Time Duration is required
Background Image Time Duration (min)	1. Required 2. Freeform text field 3. 1 minute is set by default 4. Only numbers 5. Max length: 3 characters 6. Error: Background Image Time Duration (min)
Show Date&Time	1. Optional 2. The default value is "On".
Engagement Type	1. Optional 2. List of engagement types from Settings – Programs – Briefing Types 3. Customer and Partner engagement types selected by default 4. User can uncheck all checkboxes. In that case, the user will see only the General Welcome screen.
General Welcome section	
General Welcome Greeting Message Text	1. Required 2. Freeform text field 3. Max length: 50 symbols 4. 'General Welcome Greeting Message Text' text is by default

	5. Error: General Welcome Greeting Message Text is required
Private Briefing Greeting Message Text	1. Required 2. Freeform text field 3. Max length: 20 symbols 4. 'Private Briefing' text is by default 5. Error: Private Briefing Greeting Message Text is required

LAUNCH PREVIEW

From the "Settings" page user can also launch Door Monitor product preview.

Clicking on the 'Launch Preview' button user will see a sample of product in a new browser tab.

The Door Monitor will be launched with the set settings. If the user will change any of the settings on the default settings or per specific center – it will be applied on the preview.

The 'Door Monitor' product should be displayed in full-screen mode (Not F11 like full screen, just feet the app to the size of the page)

8.3.4. MEDIA CHANNEL

NOTES:

1. The “Default Settings” will be available only for users who have access to **ALL** centers that belong to a tenant.

2. In case the user has access only to several of the centers that belong to a tenant than on the Playback page in the Center drop-down they will see only those centers and without the "Default Settings".

8.3.4.1. OVERVIEW

The first tab where user navigates from Experience – On-Site Channels –Media Channel- Overview page. On this page user can see a static information about the product.

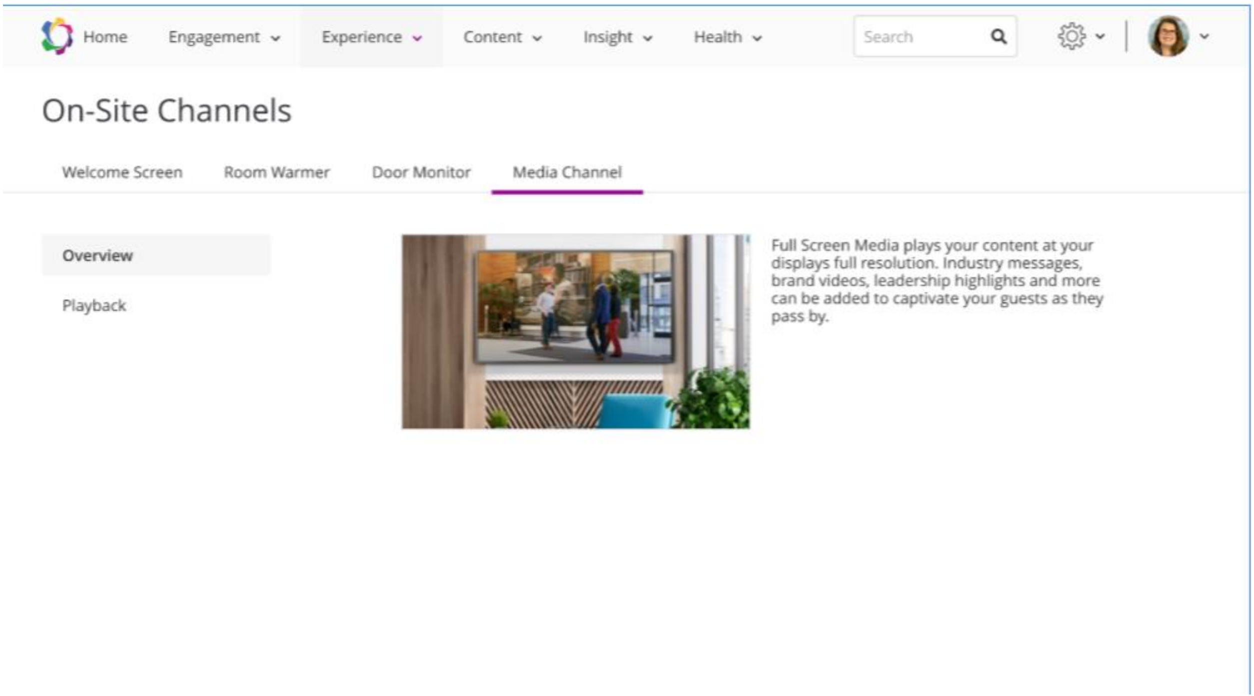


Figure 92. Media Channel - Overview page

8.3.4.2. PLAYBACK

When the user navigates to the Playback tab firstly, there will be no default items.

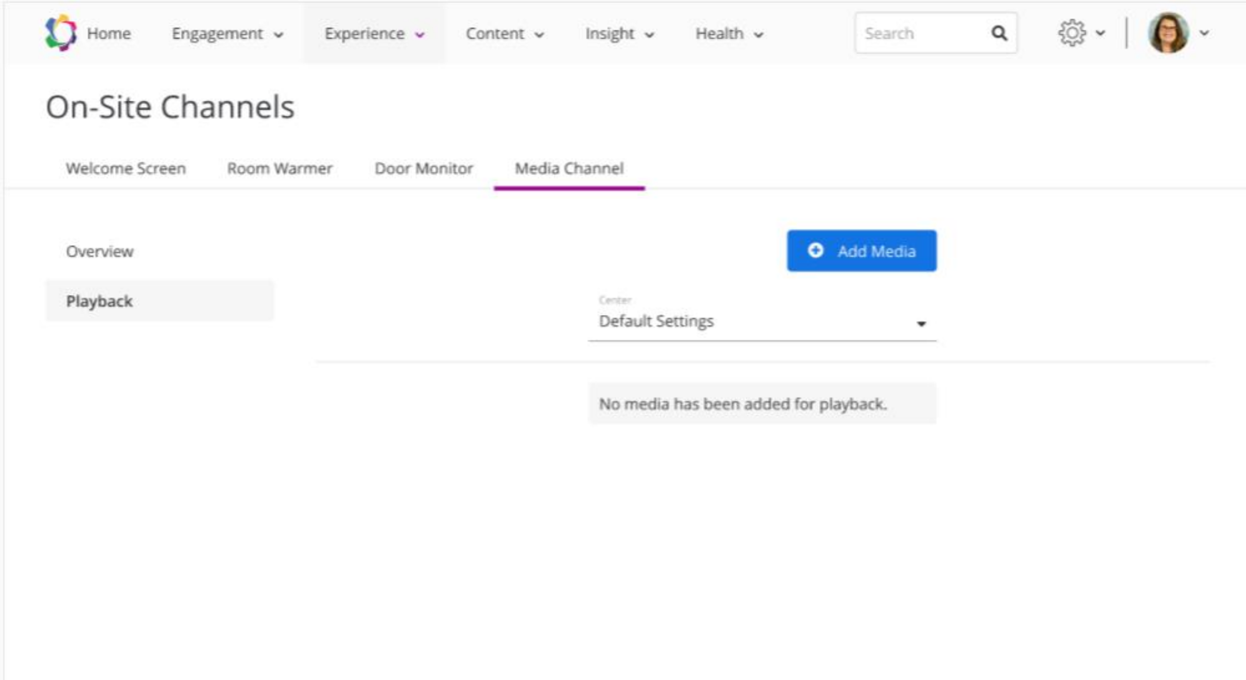


Figure 93. Media Channel - Default view

ADD MEDIA TO THE PLAYBACK FROM THE CONTENT LIBRARY

User can select already uploaded media file (image/video) from the Content > Media menu by clicking on the 'Add Media' button.

User can use the general options to filter media files:

9. filter media by type (image and video)
10. Users can find the needed media through existing media items in the Content Library tab with the help of the search field.

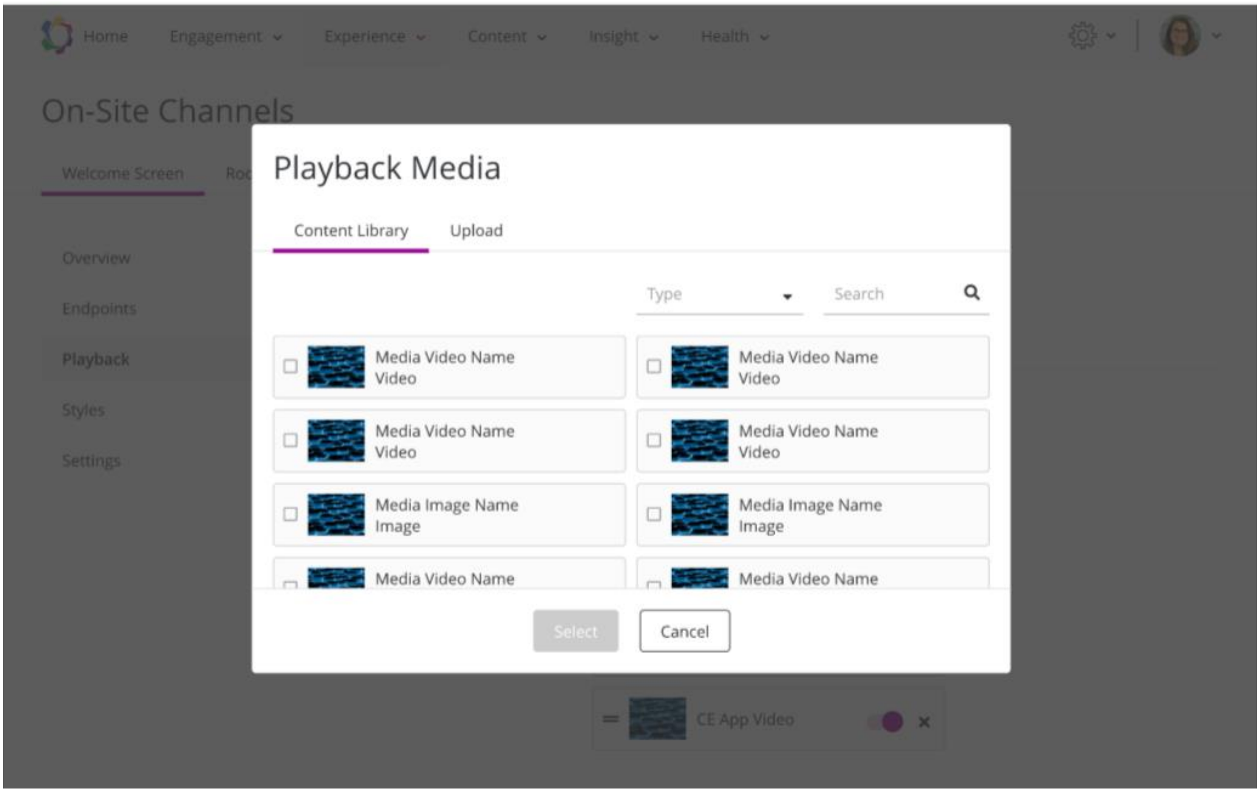


Figure 94. Add media from the Content Library menu

SELECT MEDIA FROM THE "CONTENT LIBRARY"

1. DEFAULT SETTINGS:

- The "Content Library" list will contain media files available for all centers (Center Access - 'All')
- Media added to playback for the "Default Setting" than that media will be available in the Playback tab for other centers in the drop-down

2. SELECT MEDIA TO THE SPECIFIC CENTER:

- User can select the needed center (for which the product has been assigned) from the drop-down
- The "Content Library" list will contain media files available only for the center selected from the drop-down (the center for media item is indicated during creation on the field 'Center Access')
- The multiple media files selection is available. User should select the checkbox near desired media
- The user cannot add a media file that already presented on the Playback list.
- After opening the "Playback Media" modal window the already added media will be shown as checked and inactive. The user cannot choose it again.

After the media will be added on the Media Channel Playback form, the media's product value will be updated.

- if Media Channel was already added to the media's product field on the Marketing page - nothing will be changed.
- if Media Channel was not added to the media's product field on the Marketing page - it will be added.

UPLOAD MEDIA DIRECTLY TO THE WELCOME SCREEN

User can select already uploaded media file (image/video) from the Content > Media menu by clicking on the 'Add Media' button.

On the Playback Media modal window, the Content Library tab should be displayed by default.

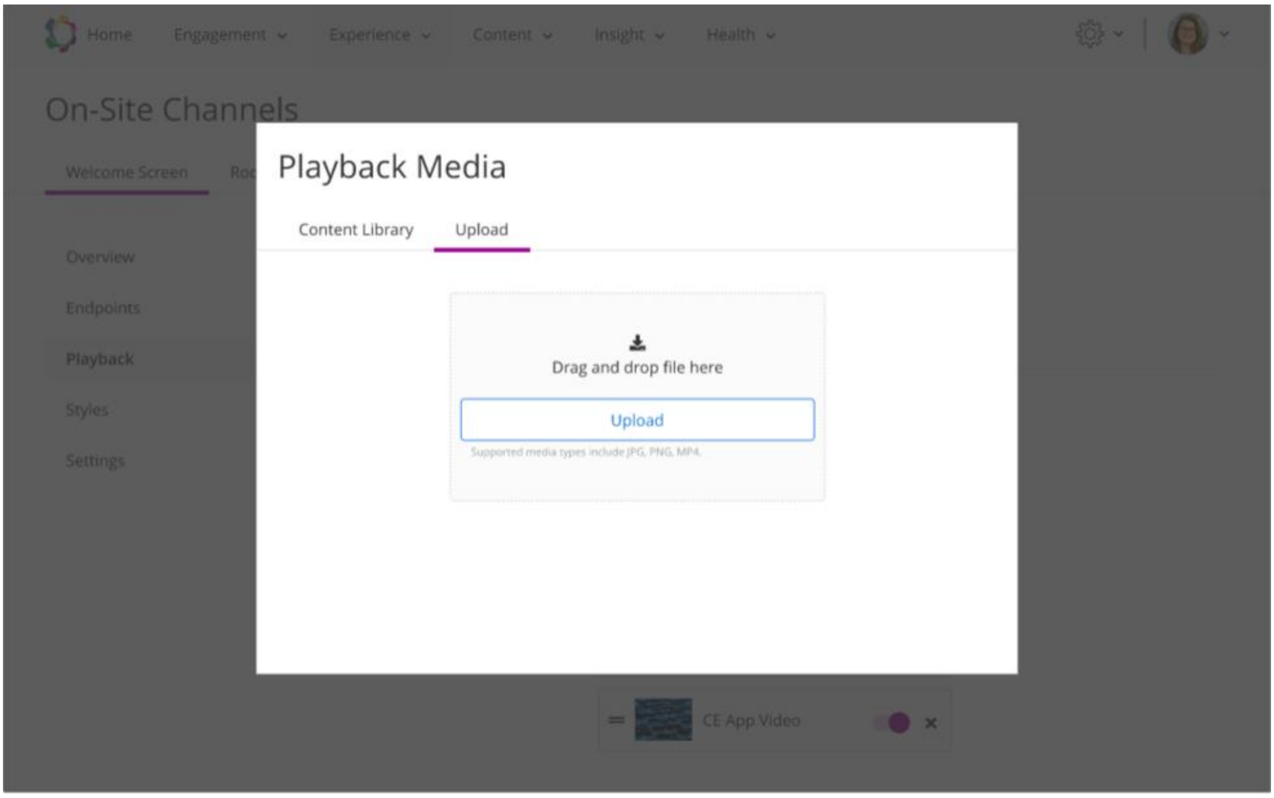


Figure 95. Direct media upload

The user can drag and drop the media to the uploading form

- Supported media types include JPG, PNG, MP4
- Max size: 2 GB
- Only one file can be uploaded at a time

Or click on the "Upload" button and select a file from the device.

Once uploaded, the user will be able to complete the media fields with the following information:

Field	Data	Validation
Media	- required - will be filled with the uploaded media - media thumbnail	Error: Media is required
Media Name	-required - freeform text field - max length: 500 symbols	- Error: Media Name is required - Uploading file (name.file_extension) exists for the current client in database.
Media Short Description	-optional - freeform text field - max length: no restrictions except the technical constrains	
Private - the private toggle will not affect any of the product **except the CE App**	-optional - "No" by the default - helper text: *Private media will be disabled from being downloaded or emailed in the CE App.*	
Industry	- required - drop-down with the list industry created - All selected by the default - multiple selection is available	- Error: Industry is required
Center	- required - drop-down with the list of Centers the user has access to: * for "Default Settings" option 'All' selected by default	- Error: Center is required

	* the center which was chosen at the “Playback” page - this center should be indicated in the field and cannot be unchecked. - multiple selection is available - the center which was chosen at the “Playback” page - this center should be indicated in the field and cannot be unchecked.	
Product	- optional - drop-down with the list of available products: * the default value will be the product for which we are uploading this media. * This will value cannot be unchecked. - The user can add also add more products. - multiple selection is available - If the Product name exceeds the dropdown width, it will ellipsis and not wrap to the next line. - this dropdown is sorted by product name alphabetically, then center name secondarily.	

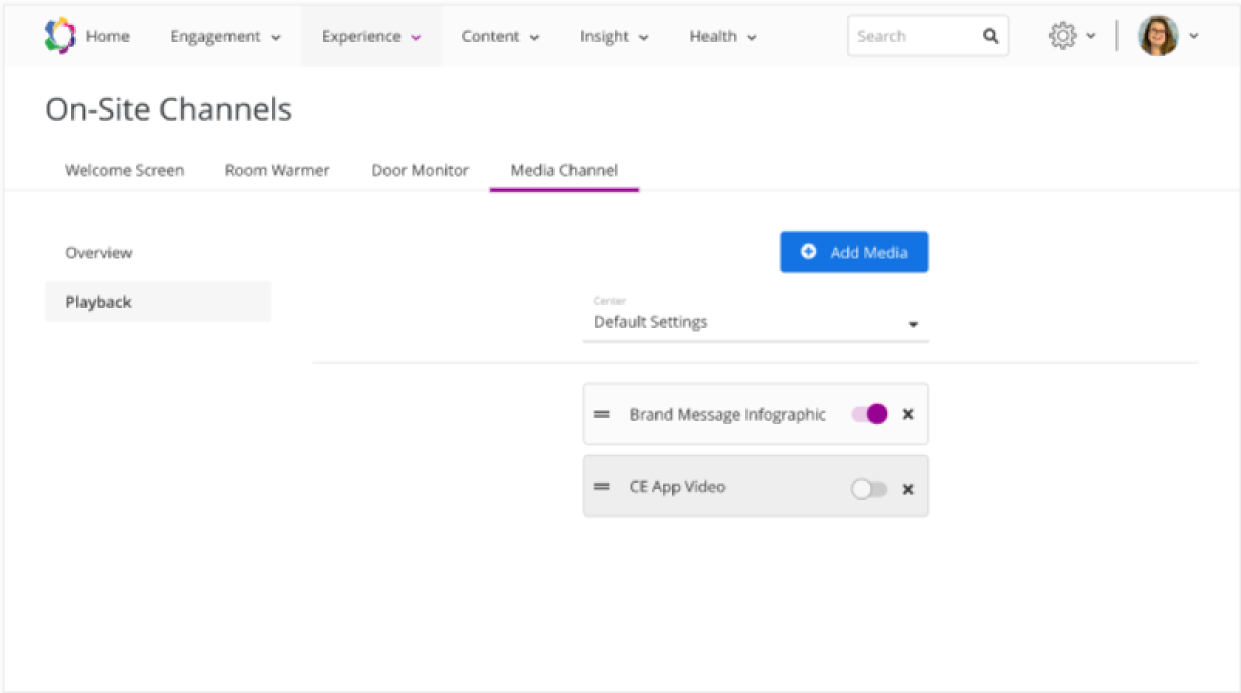


Figure 96. Playback page with additional media

8.4. PROGRAM SITE (new functionality)

There is a new menu inside the Experience tab where user can manage styles and settings for the Program Site in general and for each center separately.

8.4.1. OVERVIEW

As usual the first tab is Overview. The Overview page contains the short description about the product and launch this product with mock data.

Click on "Launch Preview" button user will open a Program Site in a new browser tab. User sees a program site with information about solutions and section with available centers.

Click on one of the center users will navigate to the Center Site page. From the Program Site overview when user clicks on the different centers, they will navigate to the same Center Site page.

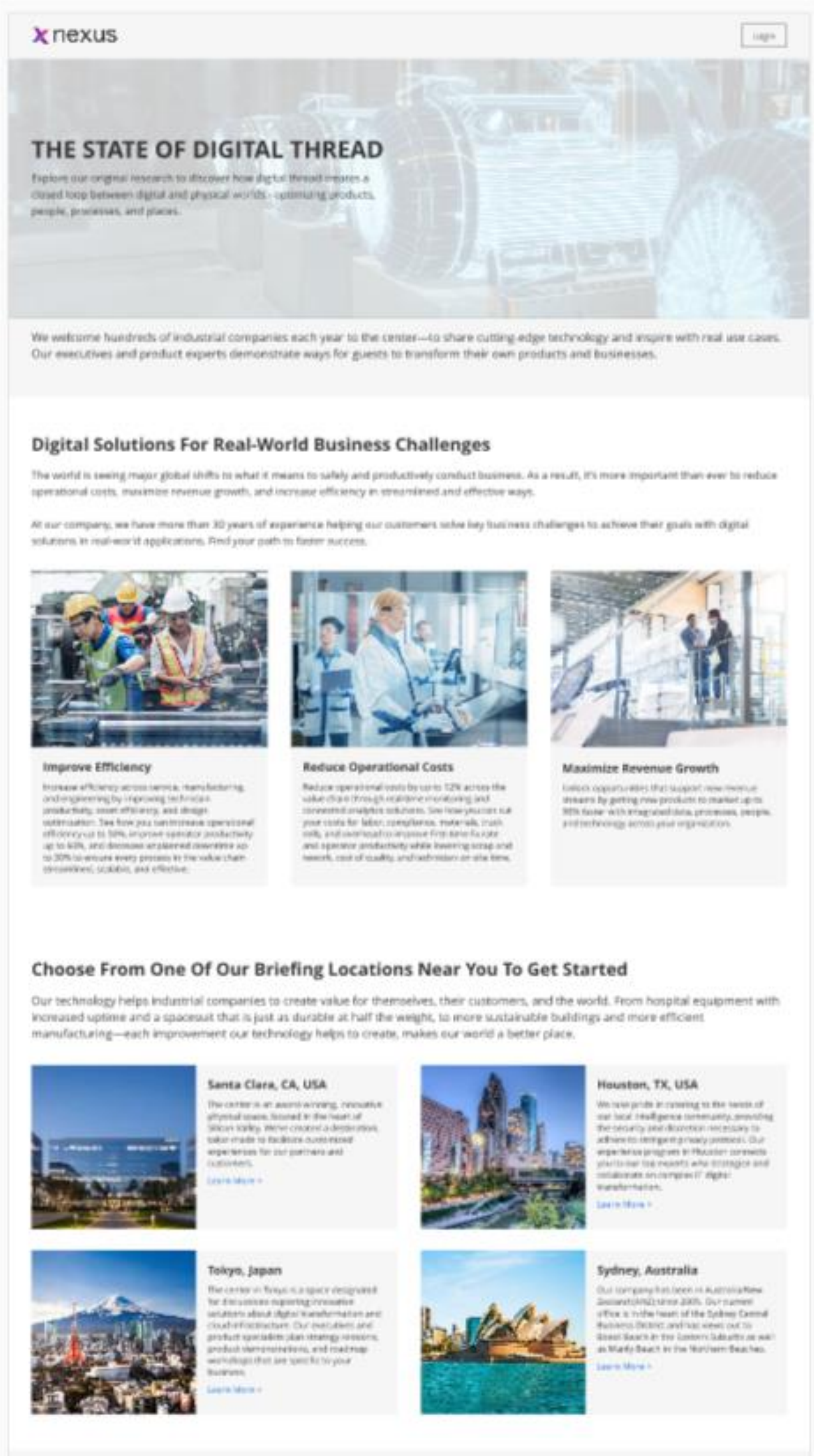


Figure 97. Program Site with mock-data

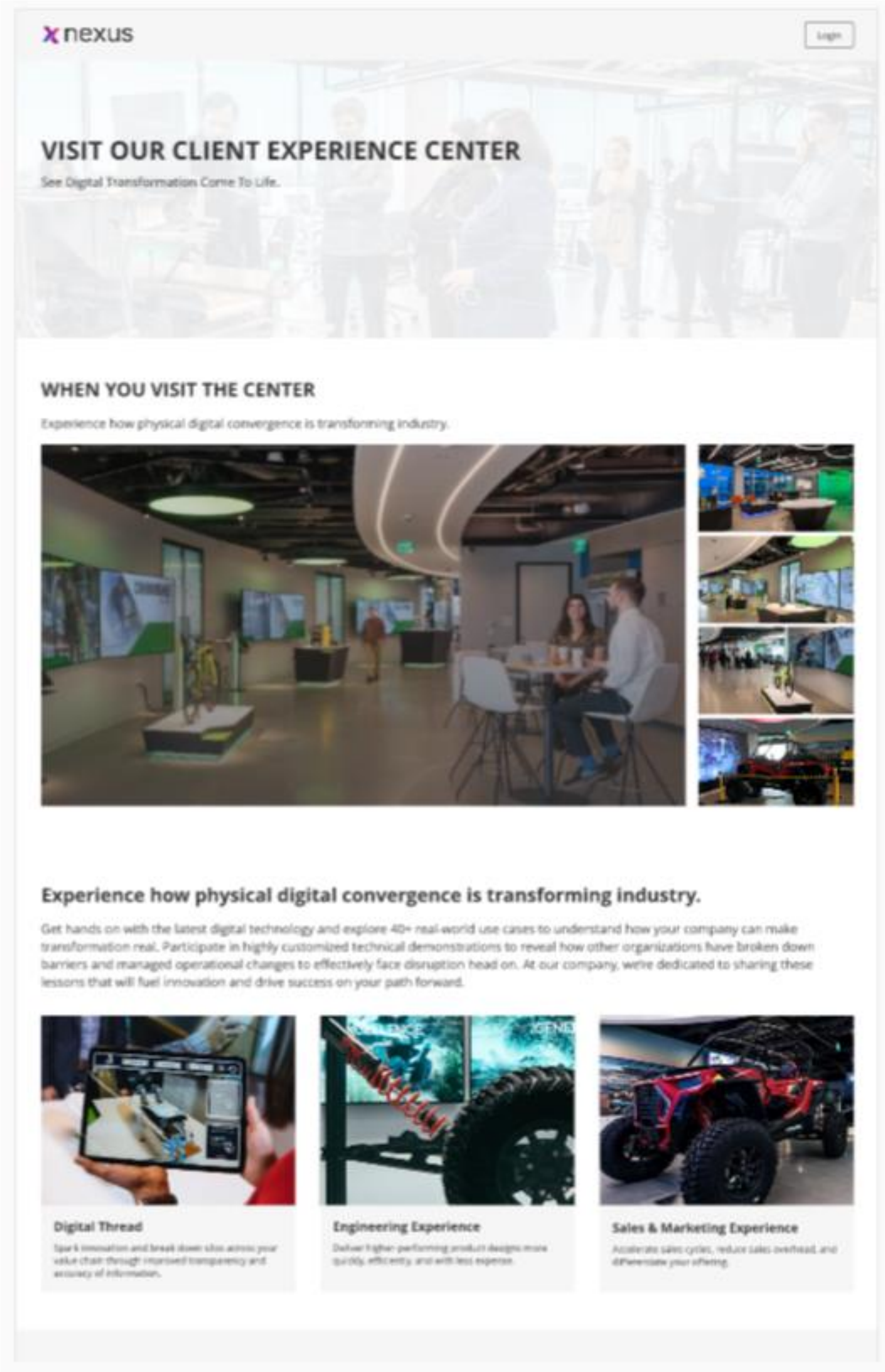


Figure 98. Center Site page

8.4.2. PROGRAM STYLES

With the Program Site - Program Styles menu user can customize the colors of content that were specified on the Program Site page.

Solution Block Styles are limited by three solution items.

The number of fields available for Center # Title Text, Center # Description Text, and Center # Image in the **Center Location Styles** section will depend on how many centers the tenant has in the hub.

User can restore program styles to default.

8.4.3. PROGRAM SETTINGS

With the Program Site - Program Settings menu user can manage the content that will be displayed on the Program Site page.

The “Enable Program Site” toggle is set to off by default. When user turn on that toggle with next login (after current session has been expired), they will see a Program Site with full content.

The number of fields available for Center # Title Text, Center # Description Text, and Center # Image in the **Center Location Styles** section will depend on how many centers the tenant has in the hub.

User can restore the program settings to default.

8.4.4. CENTER STYLES

On the Center Styles page user can customize the colors of content that were displayed on the Center Site page. User can apply the default styles for all available centers or customize each center with its own styles.

User can restore center styles to default.

8.4.5. CENTER SETTINGS

With the Program Site - Center Settings menu user can manage the content that will be displayed on the Center Site page.

The “Enable Program Site” toggle is set to off by default for the Default Settings.

- User turned ON the toggle for default setting (without changing Center Settings for the Center(s)) – all centers will be displayed on the Program Site and user should be able to navigate to the Center page

- User turned ON the toggle for default setting (change Center Settings for a specific Center(s)) – only centers with enabled toggle will be displayed on the Program Site and user should be able to navigate only to the Center Page for that center
- User turned OFF the toggle for a specific center - that center will be removed from the Program Site - Location section
- User turned OFF the toggle for all centers, but the “Enable Program Site” toggle turned ON in Program Settings page – the Program Site will be displayed without Location section.

User can restore the program settings to default.

SECTION 9: INSIGHT

9.1. REPORTING

On the Reporting page the user sees a graphical representation of important information related to briefings.

User is able to see the correlation of different aspects (attendee/value/metrics) for the briefings with the different engagement types.

The reporting charts should build only for active and completed briefings, excluding briefing with the Postponed status and briefings with engagement type = Test.

User can build different charts depending on the selected filter(s).

Date Range filter:

- The last 5 days is set by the default
- The date range is not limited

Engagement Type filter:

- “All” option selected by default
- The filter contains engagement types from the Settings except engagement type = Test

Center filter:

- “All” option selected by default
- User can see only centers specified at User Details - “Center Access”

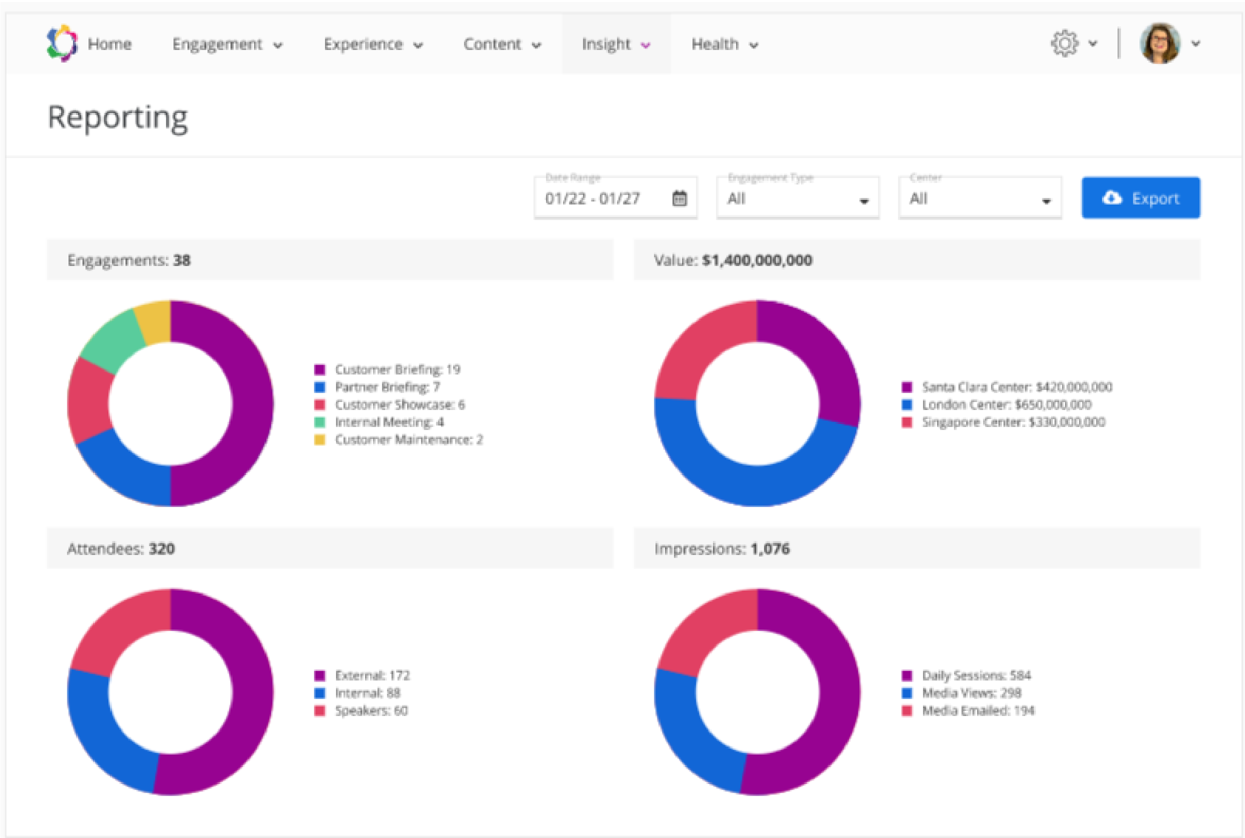


Figure 99. Reporting page

ENGAGEMENT CHART

The "Engagements" daunt chart shows user the number of briefings with the specific engagement type that were completed or will plan to be for the specific period.

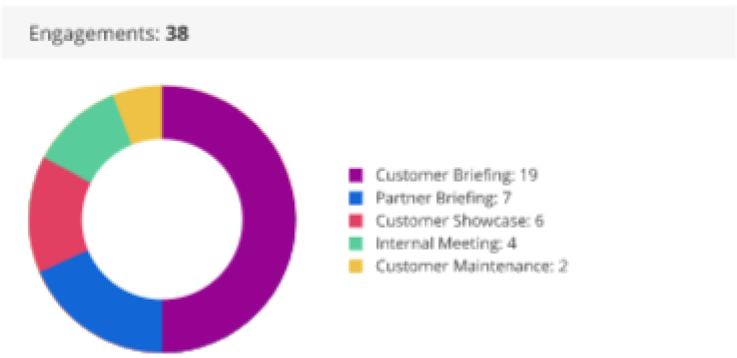


Figure 100. Engagements daunt chart

In case some engagement type deleted (for example Partner Maintenance), it will be reverted to the default engagement type = Partner Briefing and still will be shown on the reporting page.

In case the system has not data for the selected engagement type(s) user will see a grey chart with number of briefing(s) = '0'.

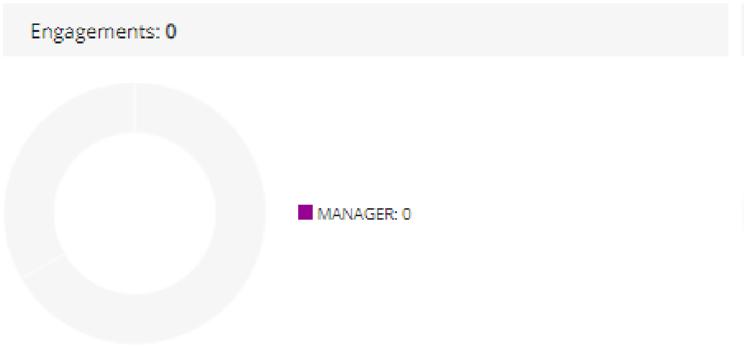


Figure 101. Engagement daunt chart with no data

ATTENDEES CHART

'Attendees' daunt chart shows how many attendees (internal/external/speakers) took a part in all briefings for a certain period.

On the 'Attendees' daunt chart the system does not count speaker(s) that was marked as “Shadow”.

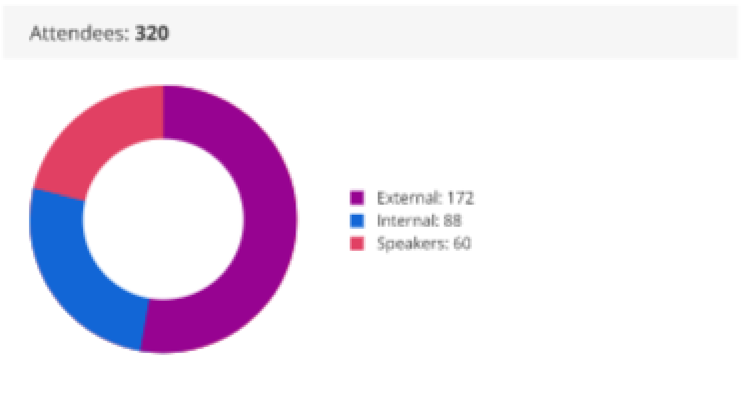


Figure 102. Attendees daunt chart

In case the system has not data related to the attendees for the selected engagement type(s) user will see a grey chart with number of attendees = ‘0’.

VALUE CHART

On the “Value” daunt chart user can see the information related to the opportunity amount for all briefings (not for the exact engagement type) that scheduled at the specific Center.

The “Value” chart should build only for the briefings with engagement types ‘Customer’ and ‘Partner’ scheduled at the specific Center.

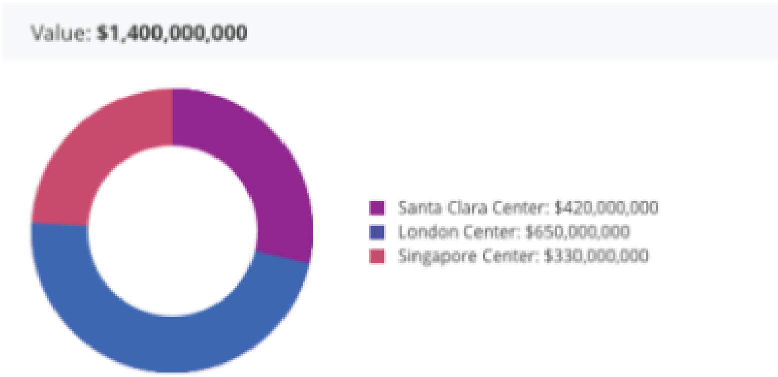


Figure 103. Value daunt chart

The "Value" chart takes data from Opportunity page from a specific Briefing.

- In case we do not have Opportunity information for the briefing then that briefing should not be including to the "Value" chart
- In case we have original opportunity data on the Briefing - Opportunity page then this opportunity value should be added to the Value for a specific Center
- In case user changed the opportunity value on the Briefing - Opportunity page then the updated opportunity value should be added to the Value for a specific Center
- In case user closed the opportunity on the Briefing - Opportunity page then this opportunity value (final opportunity value) should be added to the Value for a specific Center

In case the system has not data related to the opportunity value for the selected center(s) user will see a grey chart with total value = '0'.

IMPRESSIONS CHART

The "Impressions" daunt chart shows information related to the CE Client App Usage for all active and/or completed briefings (accept Postponed) for a certain period.

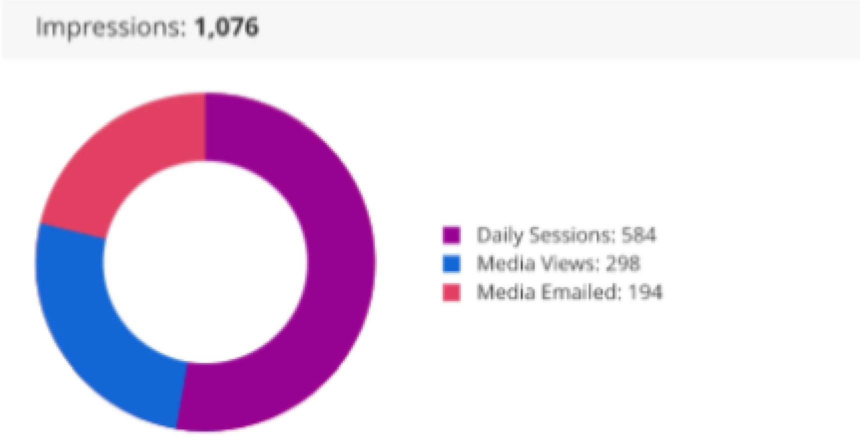


Figure 104. Impressions chart

The system will catch all activities related to the CE App (daily sessions and/or unload/view media files) even after briefing had been finished. In that case user can see the correct information on the “Impressions” chart when they selected the original briefing day.

Example:

The briefing is scheduled on the 1-st of June. User uses the Customer Portal during the day of briefing and the 2-nd of June.

When user selects the 1-st of June then on the “Impressions” chart user will be see the information about App Usage for all days (1-st and 2-nd of June).

9.2. ANALYTICS

With the help of the Insight - Analytics section, we provide our users the possibility to manage the effectiveness of the completed briefings.

We are collecting basic KPIs of CE Client App usage during the briefing lifecycle only by External Attendees.

9.2.1. APP USAGE

On the first page user will see the general information about usage of CE Client App.

On the "App Usage" page we show daily sessions (date and time when user logged into CE App Client) of all external attendees.

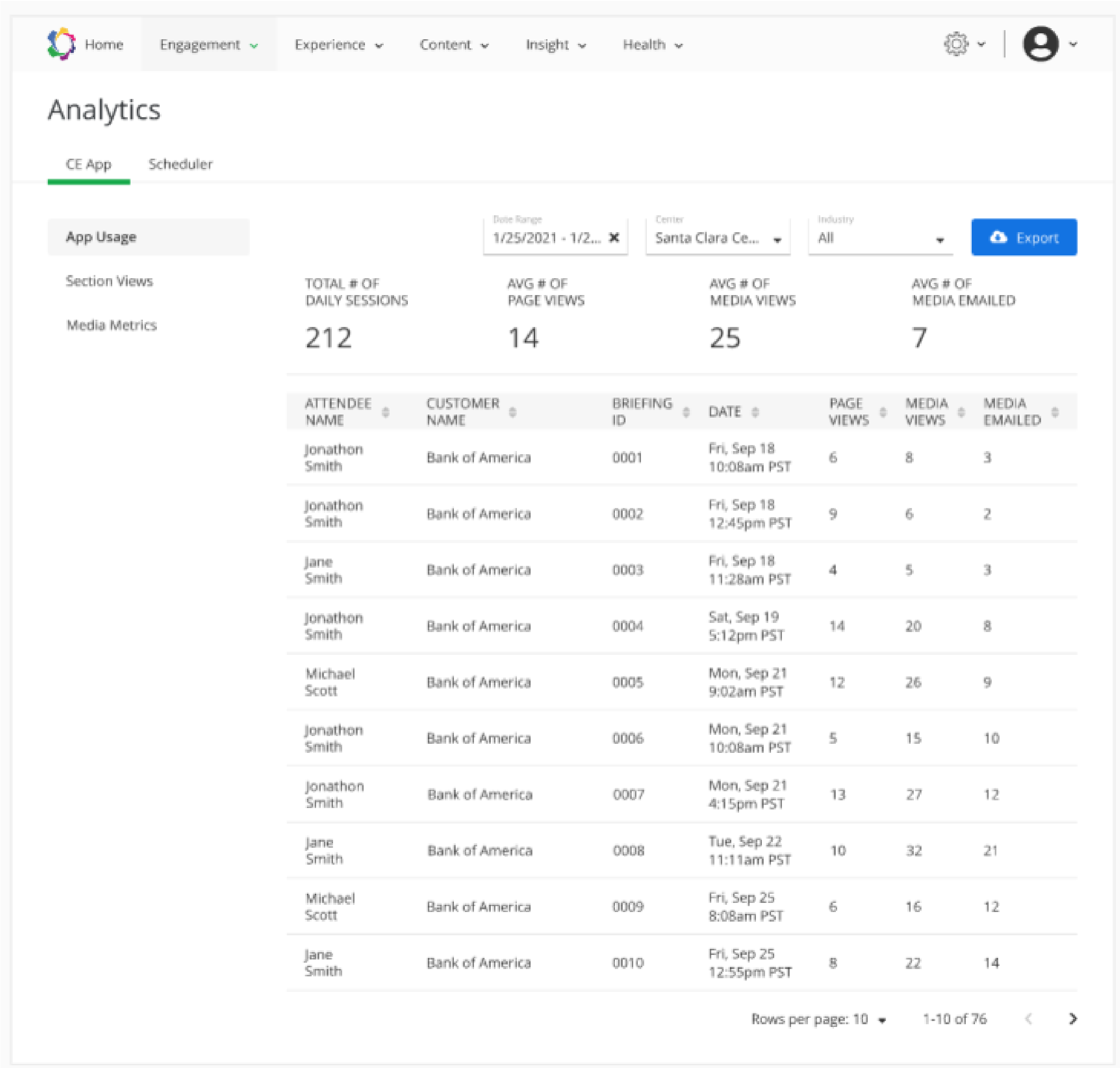


Figure 105. Ce App Analytics - App Usage

At the top of the screen user will see predefined (default) filters:

DATE RANGE

- last 5 days should be displayed by default (4 days in the past + today).
- users can select a range from a past date to the current date to see results.
- the selected Date Range cannot be greater than one year.

CENTER

- user default center

INDUSTRY

- by default we will show briefings for All industries.

User can manage information for each filter.

Based on the default filters the main table with all data for CE Client App usage and TOTALS/AVG high-level numbers will be built.

TOTAL # OF DAILY SESSIONS	AVG # OF PAGE VIEWS	AVG # OF MEDIA VIEWS	AVG # OF MEDIA EMAILED
212	14	25	7

Figure 106. TOTALS/AVG high-level numbers

EXPORT

Click on 'Export' button user should be able to export xslx file.

The exported file will separate into two tabs – App Usage Overview and App Usage Data.

	A	B	C	D	E	F
1	Date Range	Center	Industry	Total # of Daily Sessions	Avg # of Media Views	Avg # of Media Emailed
2						
3						
4						

Figure 107. App Usage Overview tab

	A	B	C	D	E	F
1	Date Range	Center	Industry	Total # of Daily Sessions	Avg # of Media Views	Avg # of Media Emailed
2						
3						
4						

Figure 108. App Usage Data tab

MOBILE VIEW:

On the mobile view, the table contents will not be shown. It will display a note to the user informing them that they can export the data (using the export button) or view the data on a larger screen device.

The filters will not be available on mobile view. The high-level metrics will still be available on the mobile view.

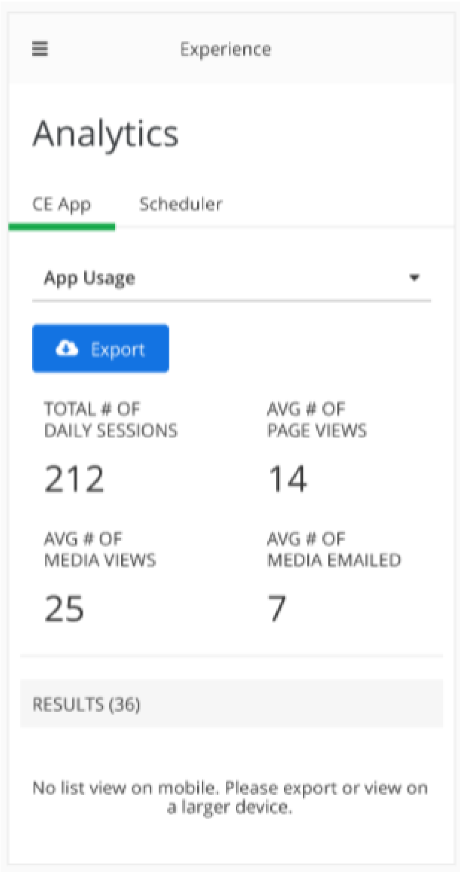
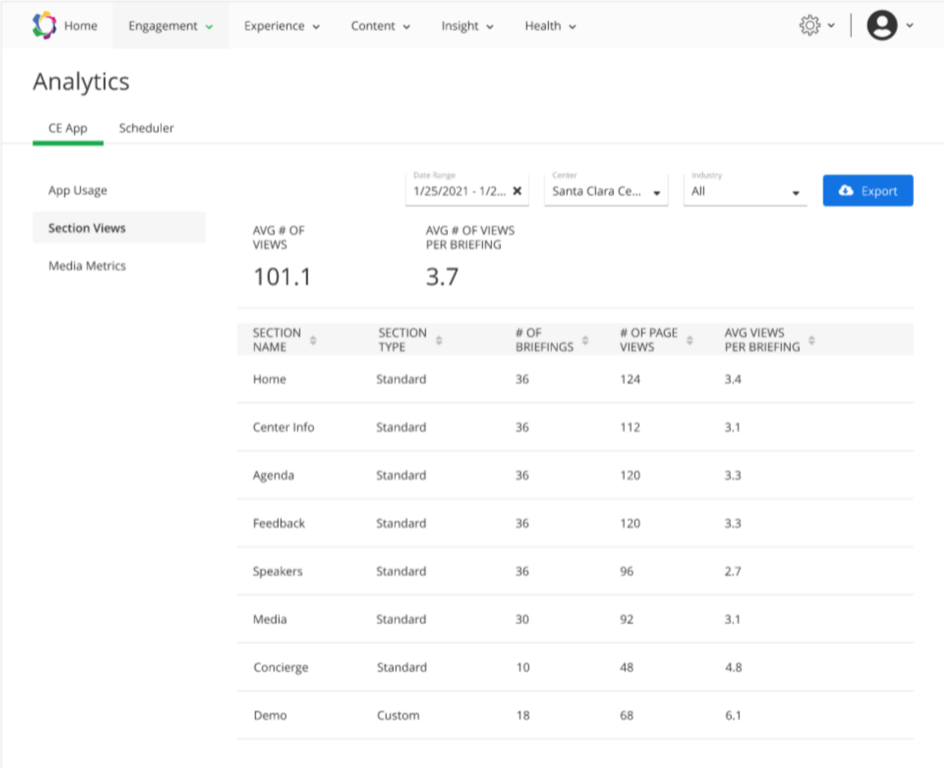


Figure 109. App Usage tab on a mobile device

9.2.2. SECTION VIEW

On the Section View page user can see information about the usage of each CE Client App tab in more close perspective.



SECTION NAME	SECTION TYPE	# OF BRIEFINGS	# OF PAGE VIEWS	AVG VIEWS PER BRIEFING
Home	Standard	36	124	3.4
Center Info	Standard	36	112	3.1
Agenda	Standard	36	120	3.3
Feedback	Standard	36	120	3.3
Speakers	Standard	36	96	2.7
Media	Standard	30	92	3.1
Concierge	Standard	10	48	4.8
Demo	Custom	18	68	6.1

Figure 110. CE App Analytics - Section View

Based on the default filters the main table with all data for CE Client App usage and TOTALS/AVG high-level numbers will be built.

Figure 111. TOTALS/AVG high-level numbers

 # OF PAGE VIEWS:

- the system will count any page that is located within a section, not just the section landing page.
- A custom tab cannot count the interactions of the webpage that is iFramed, but only the amount of times the user comes to that custom tab page.

AVG VIEWS PER BRIEFING:

- # of Page Views divide on # of Page Views
- show one decimal place for double values

EXPORT

Click on 'Export' button user should be able to export xslx file.

The exported file will separate into two tabs – Section Views Overview and Section Views Data.

	A	B	C	D	E
1	Section Name	Section Type	# of Briefings	# of Page Views	Avg Views Per Briefing
2					
3					

Figure 112. Section Views Overview tab

	A	B	C	D	E
1	Section Name	Section Type	# of Briefings	# of Page Views	Avg Views Per Briefing
2					
3					
4					

Figure 113. Section Views Data tab

MOBILE VIEW:

On the mobile view, the table contents will not be shown. It will display a note to the user informing them that they can export the data (using the export button) or view the data on a larger screen device.

The filters will not be available on mobile view. The high-level metrics will still be available on the mobile view.

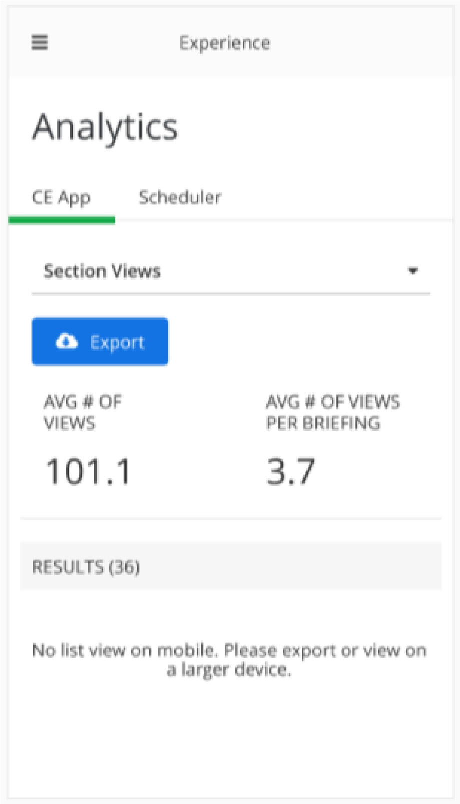


Figure 114. Section Views tab on a mobile device

9.2.3. MEDIA METRICS

On the Media Metrics page user can see the list with all media items which were viewed by the user.

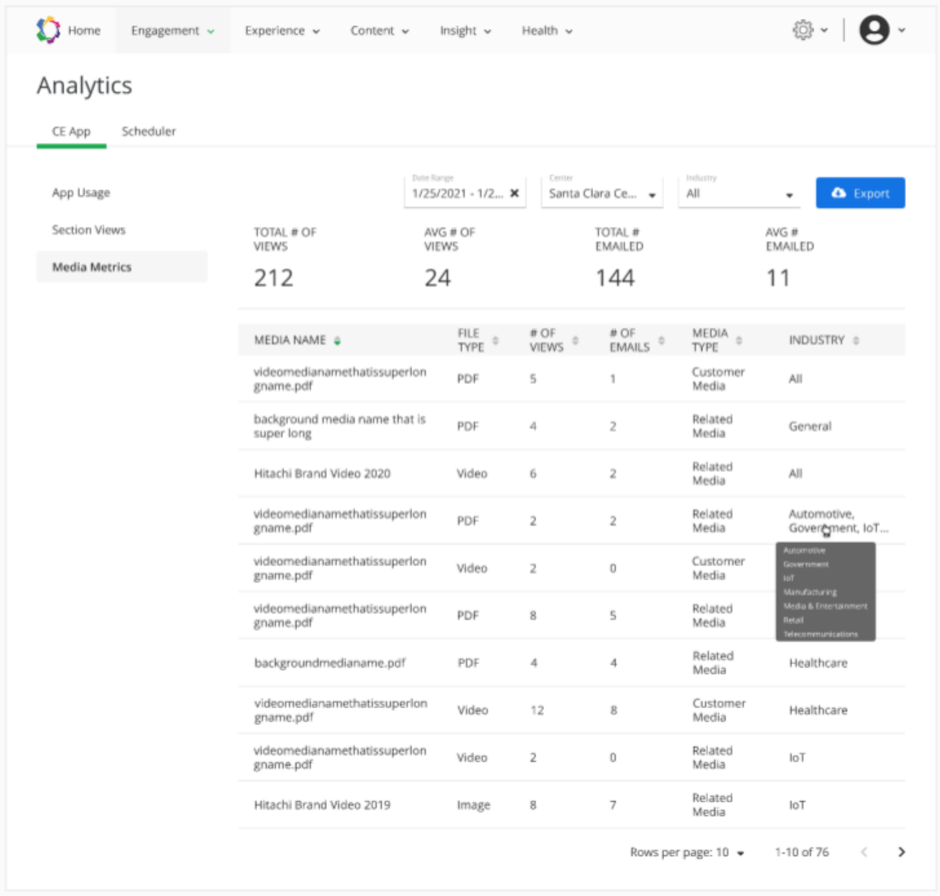


Figure 115. CE Client App - Media Metrics

Based on the default filters the main table with all data for CE Client App usage and TOTALS/AVG high-level numbers will be built.

Figure 116. TOTALS/AVG high-level numbers

EXPORT

Click on ‘Export’ button user should be able to export xslx file.

The exported file will separate into two tabs – Media Metrics Overview and Media Metrics Data.

	A	B	C	D	E	F	G
1	Date Range	Center	Industry	Total # of Views	Avg # of Views	Total # Emailed	Avg # Emailed
2							
3							
4							

Figure 117. Media Metrics Overview tab

	A	B	C	D	E	F
1	Media Name	File Type	# of Views	# of Emails	Media Type	Industry
2						
3						
4						

Figure 118. Media Metrics Data tab

MOBILE VIEW:

On the mobile view, the table contents will not be shown. It will display a note to the user informing them that they can export the data (using the export button) or view the data on a larger screen device.

The filters will not be available on mobile view. The high-level metrics will still be available on the mobile view.

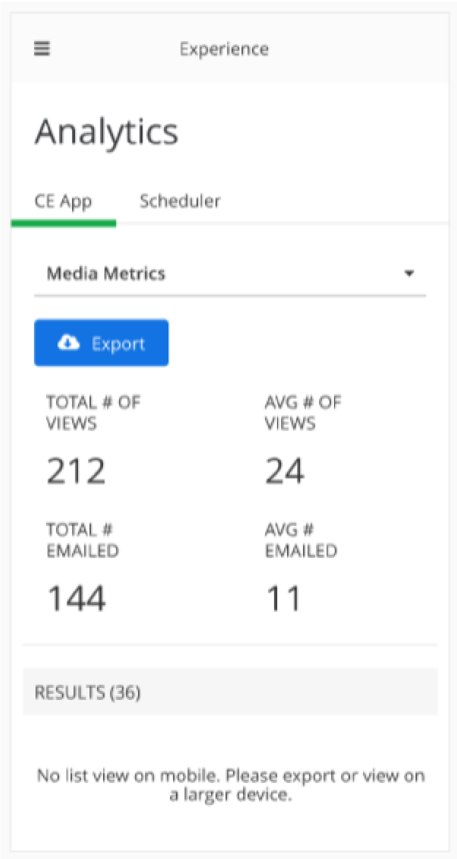


Figure 119. Media Metrics tab on a mobile device

SECTION 10: CONTENT

10.1. MEDIA

The Content – Media is a new menu where the Briefing Manager will store all media files. The media files from the Media Library will be used for the products – briefing media, virtual warmer additional media, Customer Portal, Signet Player.

We migrated the media files from the Experience – Customer Portal – Media page to the Media library.

We also changed the logic and now user can add the media files from the Media Library to the products – briefing media, virtual warmer additional media, Customer Portal, Signet Player.

ADD/EDIT MEDIA

Clicking on the 'Add Media' button user will navigate to the 'Media Details' form where they can create a new marketing media.

Field	Data	Validation
Media	- required - will be filled with the uploaded media - media thumbnail	Error: Media is required
Media Name	-required - freeform text field - max length: 500 symbols	- Error: Media Name is required - Uploading file (name.file_extension) exists for the current client in database.
Media Short Description	-optional - freeform text field - max length: no restrictions except the technical constrains	
Private - the private toggle will not affect any of the product **except the CE App**	-optional - "No" by the default - helper text: *Private media will be disabled from being*	

	downloaded or emailed in the CE App.	
Industry	- required - drop-down with the list industry created - All selected by the default - multiple selection is available	- Error: Industry is required
Center	- required - drop-down with the list of Centers the user has access to: * for “Default Settings” option ‘All’ selected by default * the center which was chosen at the “Playback” page - this center should be indicated in the field and cannot be unchecked. - multiple selection is available - the center which was chosen at the “Playback” page - this center should be indicated in the field and cannot be unchecked.	- Error: Center is required
Product	- optional - drop-down with the list of available products: * the default value will be the product for which we are uploading this media. * This will value cannot be unchecked. - The user can add also add more products. - multiple selection is available - If the Product name exceeds the dropdown width, it will	

	ellipsis and not wrap to the next line. - this dropdown is sorted by product name alphabetically, then center name secondarily. - The user can also leave the product drop-down empty or do not choose any of the On-Site Channel products which means that this media will not be added to any of the playbacks or in the Customer Portal/Virtual Warmer.	

WELCOME SCREEN ASSOCIATIONS:

After the user will choose the On-Site Channels - Welcome Screen inside the Product drop-down, this media will be automatically added to this product playback per the chosen Center.

The user can also uncheck the Welcome Screen product in the Product drop-down and this will automatically remove this media from the product playback in accordance with the specified Center.

The user can remove the Media from the Playback tab. The Media will not be removed from the Content > Marketing tab but the Product value will be updated.

ROOM WARMER ASSOCIATIONS:

After the user will choose On-Site Channels - Room Warmer inside the Product drop-down, this media will be automatically added to the product playback for all Rooms of the chosen Center.

The user can also uncheck the Room Warmer product in the Product drop-down and this will automatically remove this media from the product playback for all rooms in accordance with the specified Center.

The user can remove the Media from the Playback tab. The Media will not be removed from the Content > Marketing tab but the Product value will be updated.

MEDIA CHANNELS ASSOCIATIONS:

After the user will choose the On-Site Channels – Media Channels inside the Product drop-down, this media will be automatically added to this product playback per the chosen Center.

The user can also uncheck the Media Channels product in the Product drop-down and this will automatically remove this media from the product playback in accordance with the specified Center.

The user can remove the Media from the Playback tab. The Media will not be removed from the Content > Marketing tab but the Product value will be updated.

VIRTUAL WARMER ASSOCIATIONS:

User can add a media for the specific briefing in the Experiences page - Virtual Welcome Additional Media. Clicking on the "Upload" button user will see the Content – Media dialog box where they can select media from the Content Library or Upload a new media file

CUSTOMER PORTAL ASSOCIATIONS:

After the user will choose Customer Portal inside the Product drop-down, this media can be presented on the Customer Portal > Media tab if briefing's industry == media's industry

The user can also uncheck the Customer Portal in the Product drop-down and this will automatically remove this media from the product regarding the center.

For the multi-accounts briefings, we will show media for any/all accounts industry.

User can add a media for the specific briefing in the Experiences page - CE App Customer Media. Clicking on the "Upload" button user will see the Content – Media dialog box where they can select media from the Content Library or Upload a new media file

PREVIEW/DOWNLOAD MEDIA

Clicking on the media name user will navigate to the 'Media Details' overview page where they can view all information about media.

Clicking on the **'Preview'** text link user will open the media item in a new browser tab. From this tab, the user can download the media item.

- The video will be opened in the default player and will start to play.
- PDF files should also be opened with an option to preview them.

Clicking on the **"Download"** user will download the media file to their local machine.

SECTION 11: VIRTUAL WARMER SCREEN

On the Briefing Overview page user can also see ‘Launch Virtual Welcome’ link. With the help of that link, user can navigate to the Virtual Screens with information (Briefing Name and Agenda) for that briefing.

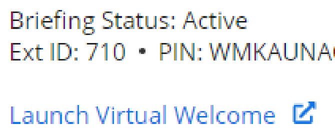


Figure 120. Launch Virtual Welcome link

Clicking on that link user should navigate to the new tab with Virtual Welcome screens.

HEADER

1. On the header, the user can observe the section with the current time in a time zone related to the Briefing Center.

This section will be displayed if user turns on the “Show Time in Header” toggle on the Experience > Virtual Screens > Settings tab.

User can also see information related to the additional time zone for the Briefing.

This section will be displayed if user selects that information on the menu Engagement > Briefing Details > Facilitation tab and turns on the “Show Secondary Time” toggle on the Experience > Virtual Screens > Settings tab.

There are possible combinations:

- Turn on the “Show Time in Header” and the “Show Secondary Time” toggle
- Turn on only the “Show Time in Header” toggle
- Turn on only the “Show Secondary Time” toggle
- Turn off both toggles

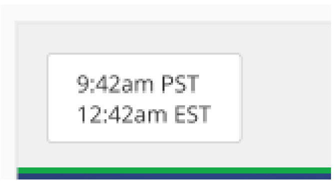


Figure 121. Time section

2. Play Music button

If the “Show Music in Header” toggle is on in the Virtual Warmer – Settings page and the audio file is selected, then on the product header should be displayed “Audio” button

- the default button view - audio button with the “Play” element
- click on the audio button - the system will play a selected audio file in a loop
- when the audio is playing the ‘play’ element changes to the ‘pause’

3. Also, user can manage breaks and pauses during briefing setting up stopwatch value from the drop-down menu with 5-minute increment values (from 5 till 60 minutes).

Control element includes:

- Previous button
- Play/Pause button
- Next button

Figure 122. Stopwatch

Once stopwatch value was selected countdown should start. User should be able to turn off the countdown by clicking on 'X' button.

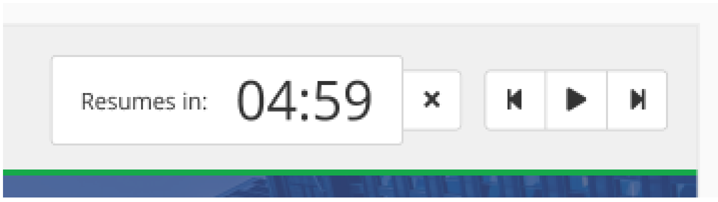


Figure 123. Countdown

Once the stopwatch countdown started, controls will hide after 5 seconds. To made control visible user should hover the header again.

The controls for Previous, Play/Pause, and Next do not affect the countdown.

GENERAL SCREEN

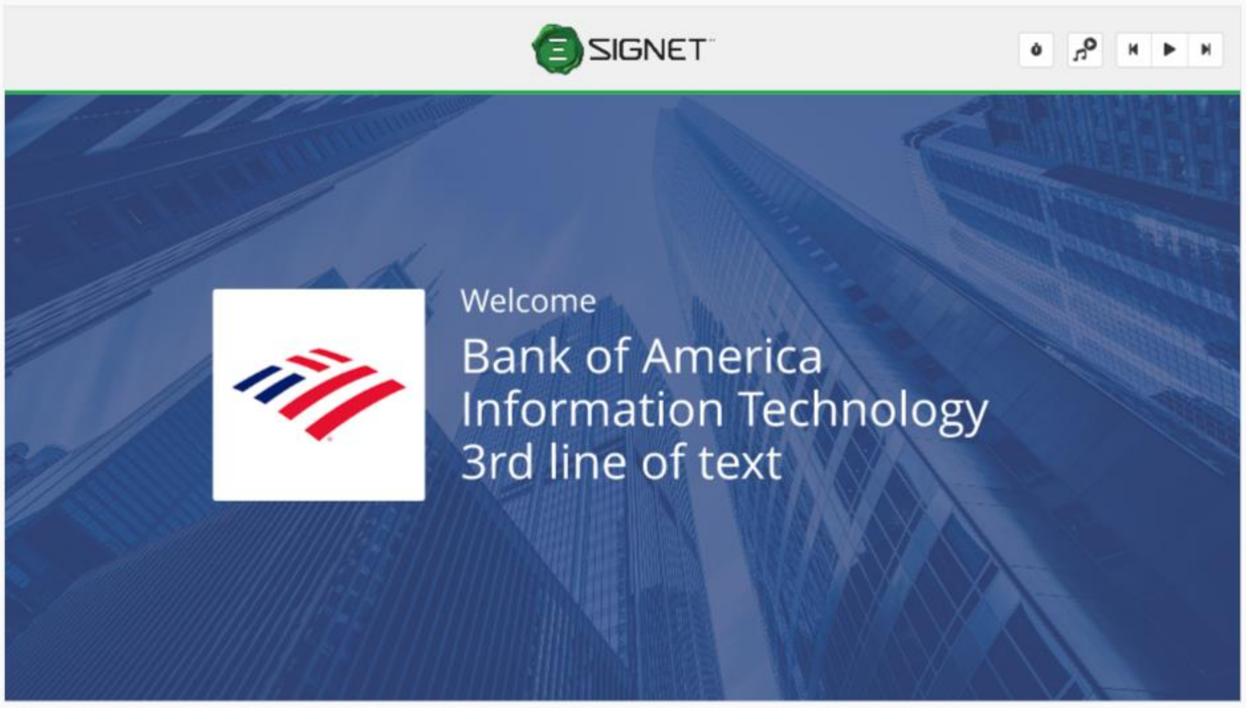


Figure 124. Virtual Welcome first screen

On the first screen should be displayed the following information:

- Company Logo with or without white container
- 'Welcome' predefined text
- Briefing Name

AGENDA SCREEN

On the next screen should be displayed screen with Agenda information. Depending on briefing duration (single day or multi-day) user will see one or more virtual screen(s) with the agenda.

For single day briefings, on Virtual Welcome screen the label for the Agenda view will be "Today's Agenda".

Figure 125. Agenda for single-day briefing

For multi-day briefings, on Virtual Welcome screen the label for the Agenda view will be "'s Agenda". The agenda will display all available days of the briefing unless it has already passed.

Figure 126. Agenda for multi-day briefing

User can expand each agenda item if it contains some description and/or assigned speaker. The user can expand and collapse an agenda item whenever they want.

Agenda items with no description or speakers will not have an expand icon.

The scroll is implemented for the page for expanded agenda items that exceed the height.

The agenda item will also **automatically expand 5 minutes before** the specific agenda start time and will stay on the screen as long as its duration will be.

The user can only expand one agenda item at a time, if the user expands an agenda item while another is already expanded, the previously expanded agenda item will collapse and the new one will expand.

If the user has the screen on a pause state, nothing will automatically expand or cycle. But the user can still expand and collapse agenda items manually.

On the top of the expanded area user will see an Agenda Topic Description.

Below the Agenda Topic Description will be located the speaker's information:

- The Speaker Headshot
- Speaker First/Last Name
- Speaker Title

The max number of Speakers on the extended view is 10.

User can show or hide the speaker headshot with the help of "Show Speaker Headshot" toggle on the Experience > Virtual Screens > Settings tab.

If the Speaker will not have headshot attached while "Show Speaker Headshot" toggle set to "ON" - the default image will be displayed.

If "Show Speaker Headshot" is set to "Off" - the extended agenda view will be shown without headshots.

SECTION 12: CUSTOMER PORTAL (new product layout)

12.1. LOGIN FORM

Before the system will have a briefing context, user will see an old UI for "Meeting ID" form.

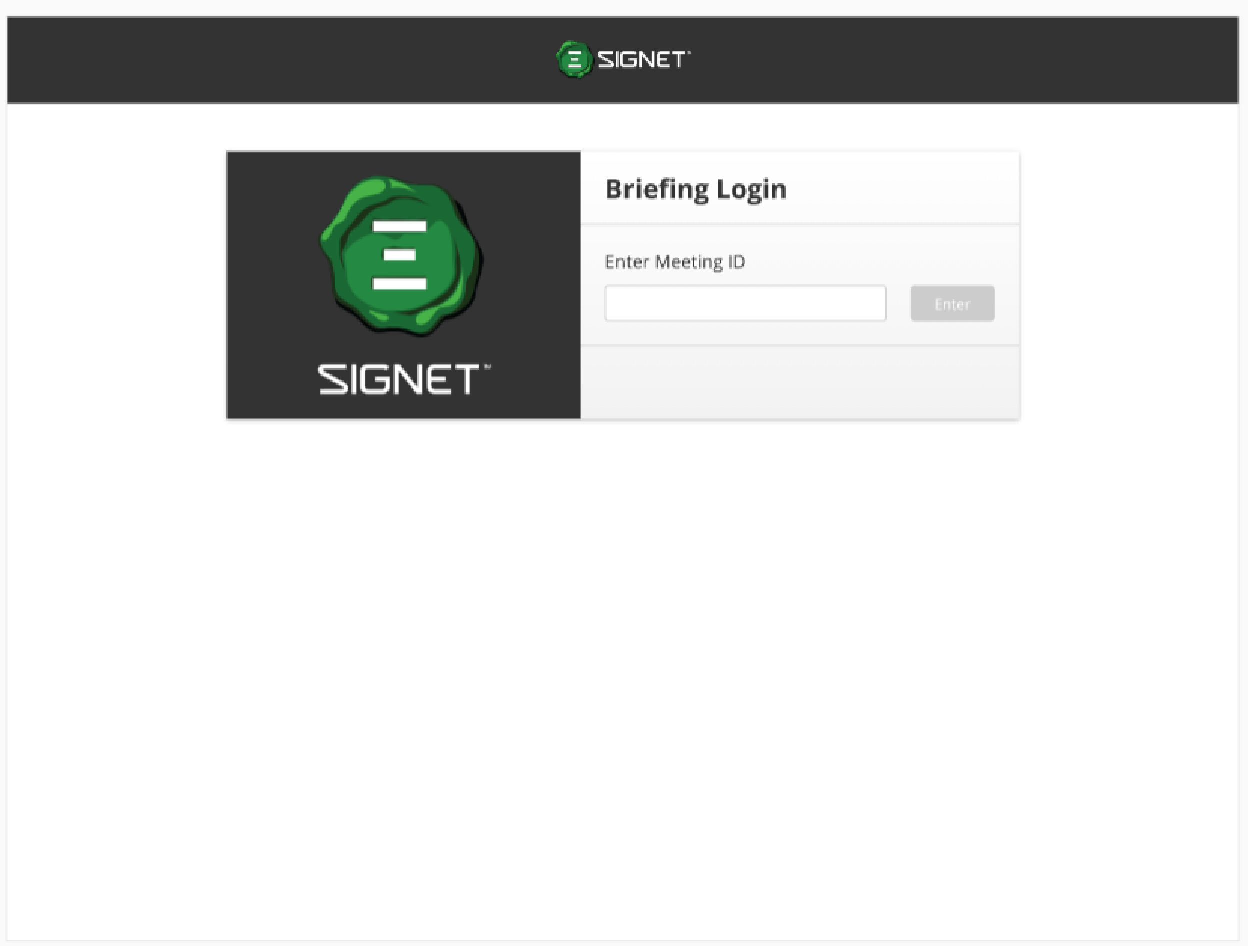


Figure 127. Login Form

12.2. ATTENDEE SELECTION FORM

When attendee entered the Briefing ID after that we have a briefing context, and they can see next page (Attendee Selection page) with new Customer Portal layout.

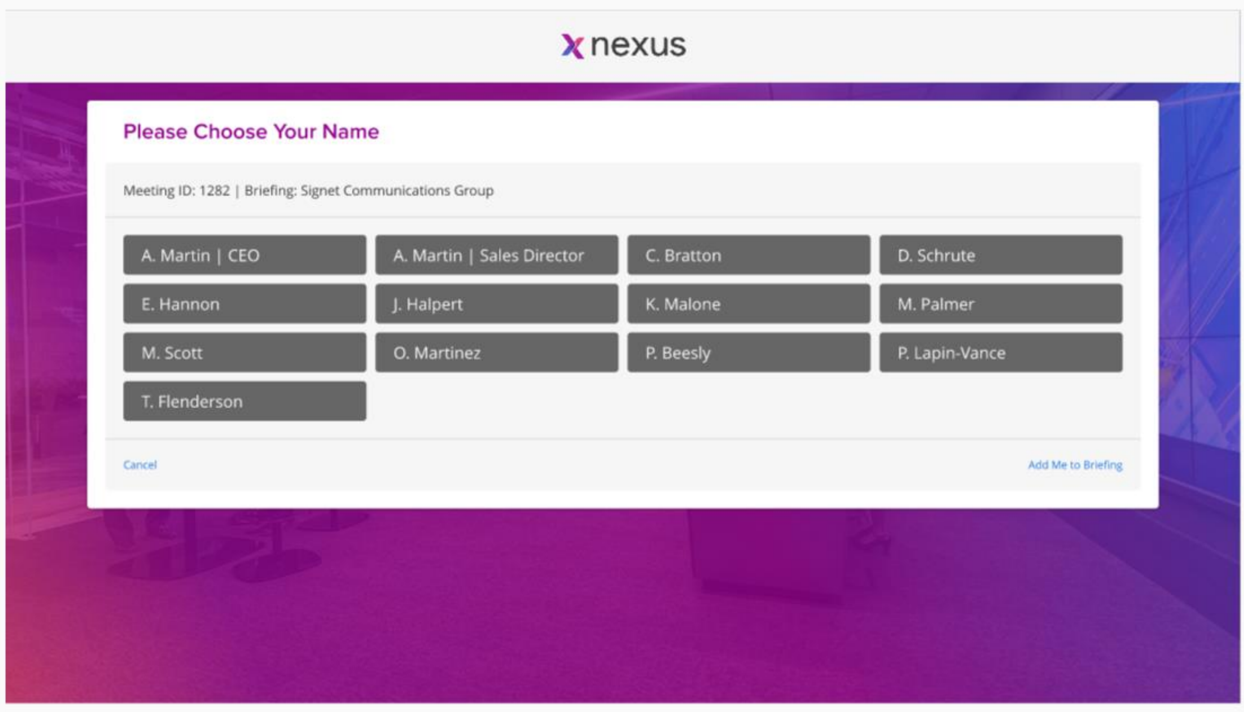


Figure 128. Attendee Selection form

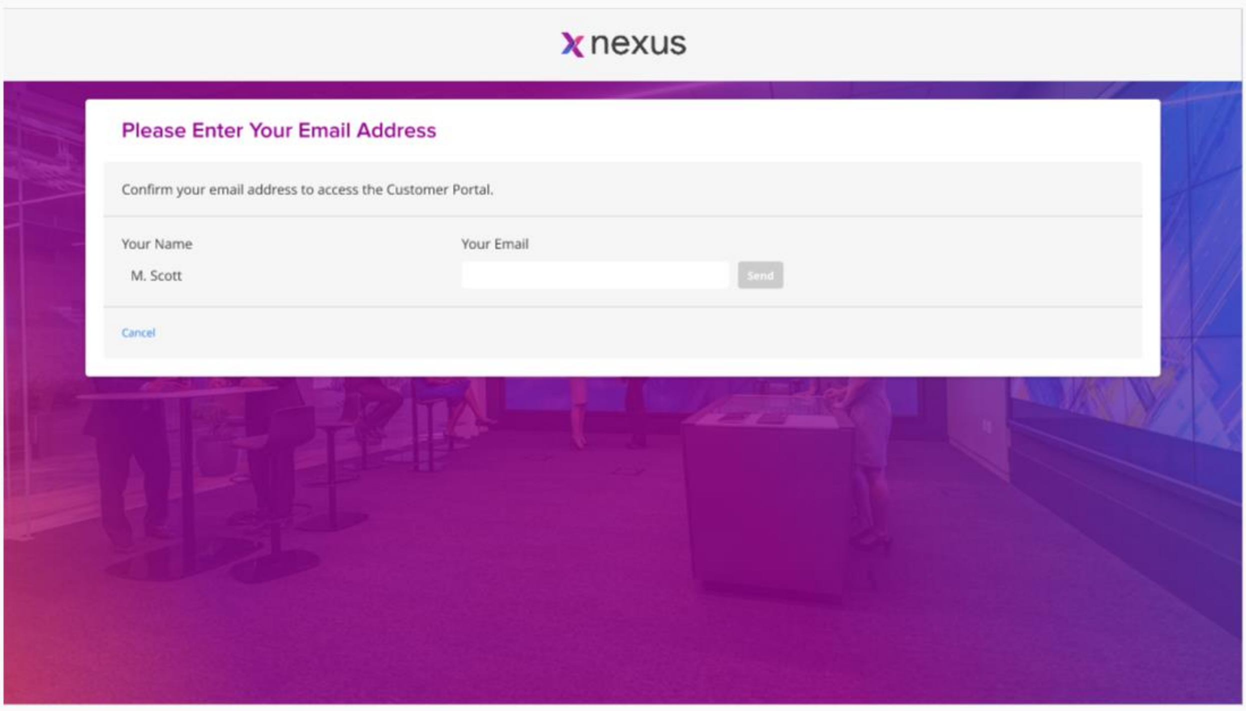


Figure 129. Attendee Confirmation email

12.3. HOME SCREEN

Home page with new layout looks wide and the Center Info and Concierge sections located at the right part of the screen.

Center Info and Concierge sections will be displayed only for pre-briefing period.

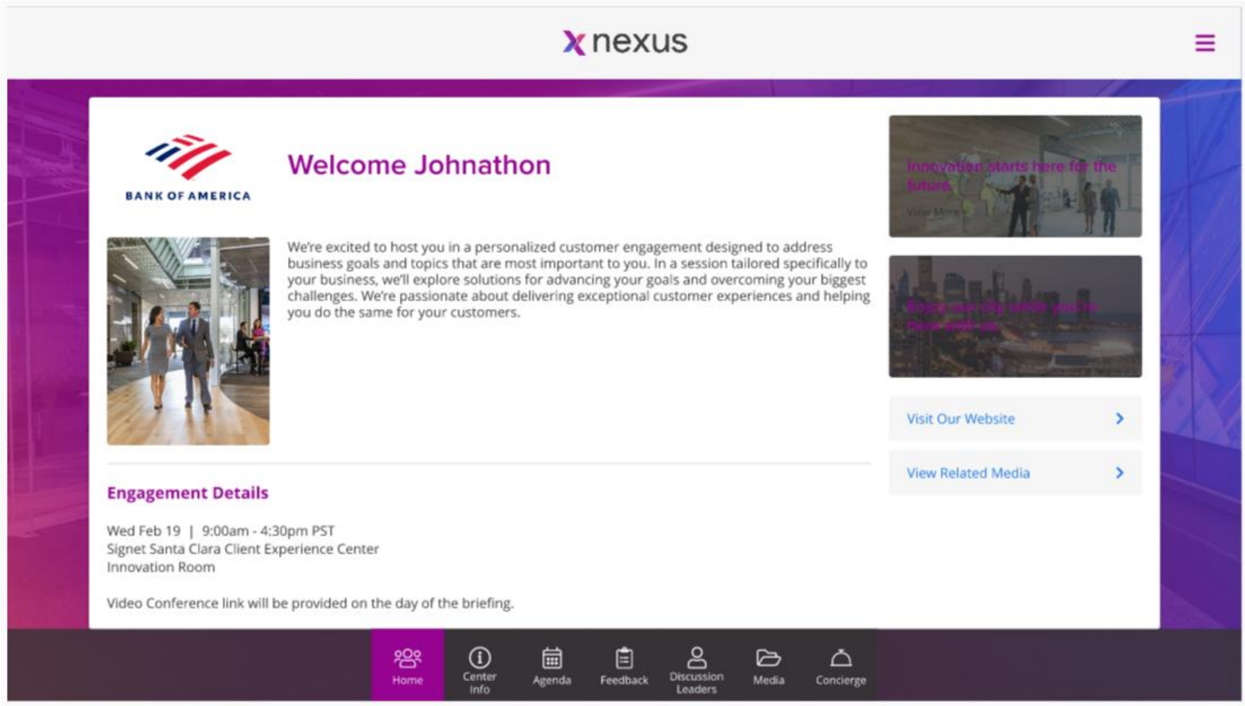


Figure 130. Home page with bottom navigation menu

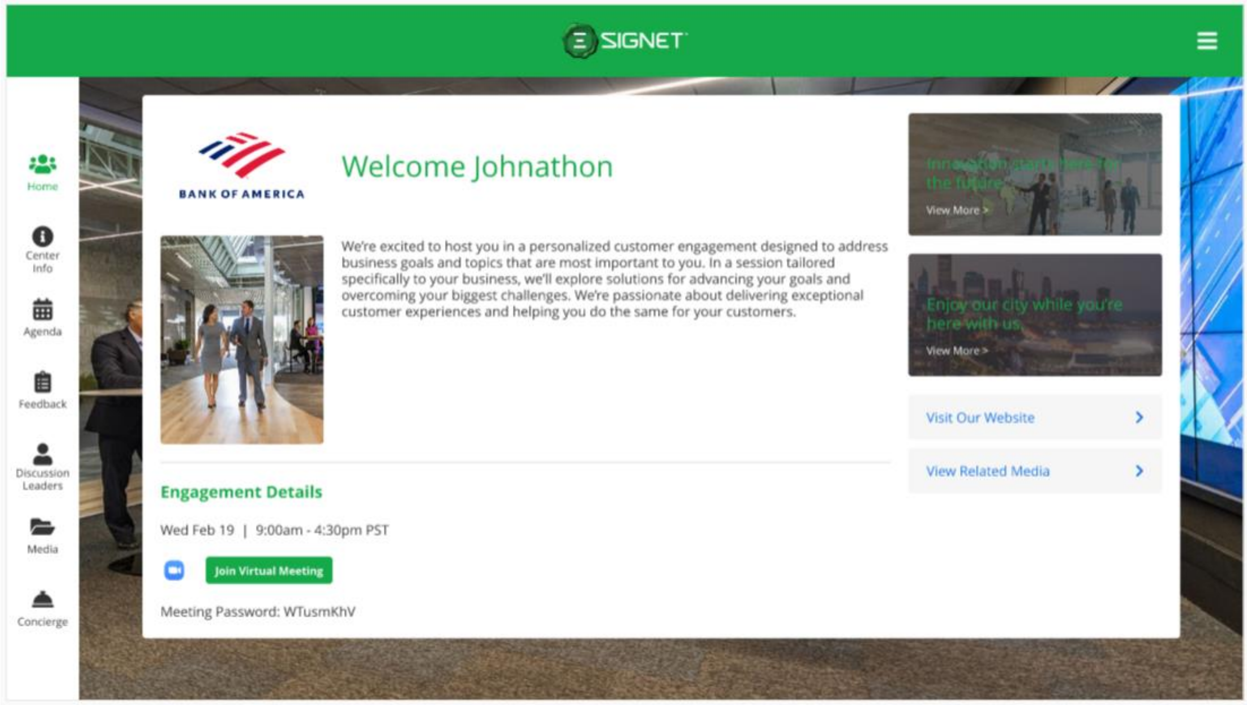


Figure 131. Home page with left navigation menu

Information about briefing hidden in the slideout menu. To open that section user can click on the "Hamburger" button.

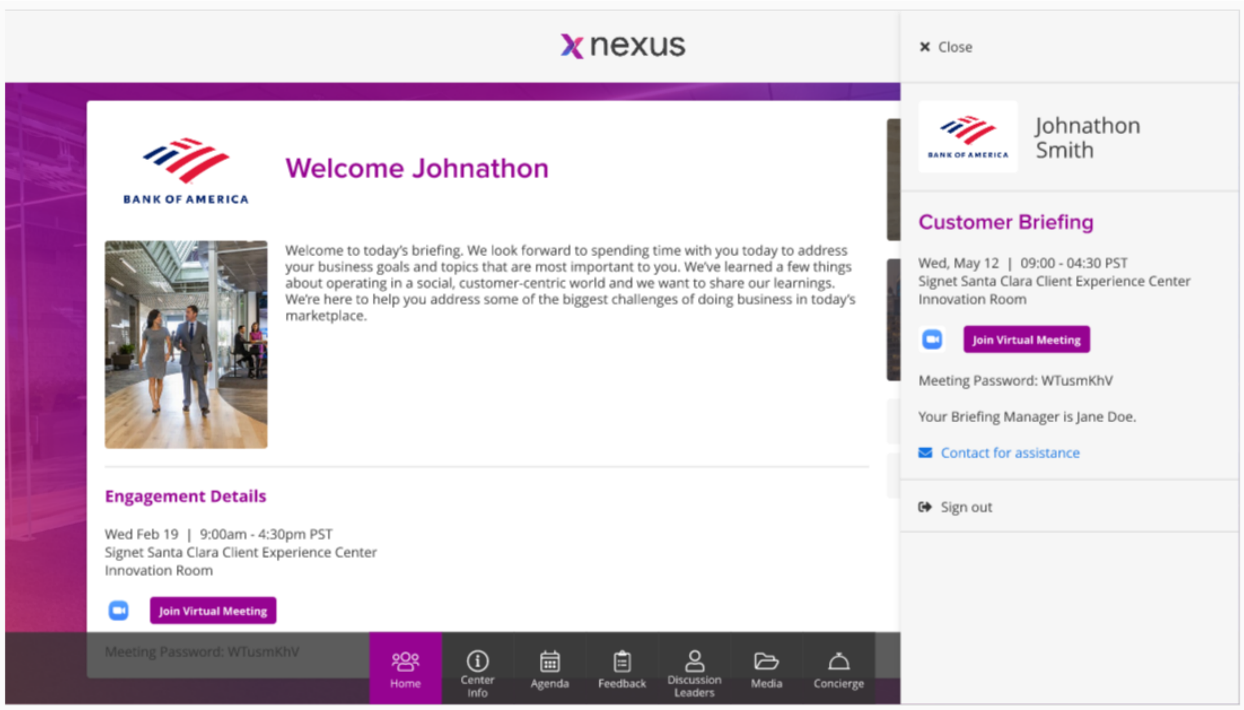


Figure 132. Slideout menu

12.4. CENTER INFO

Center Info page looks wider, and images has bigger resolution.

On the Leadership Team page the leadership team member's photos has a bigger resolution that at the old Customer Portal UI.

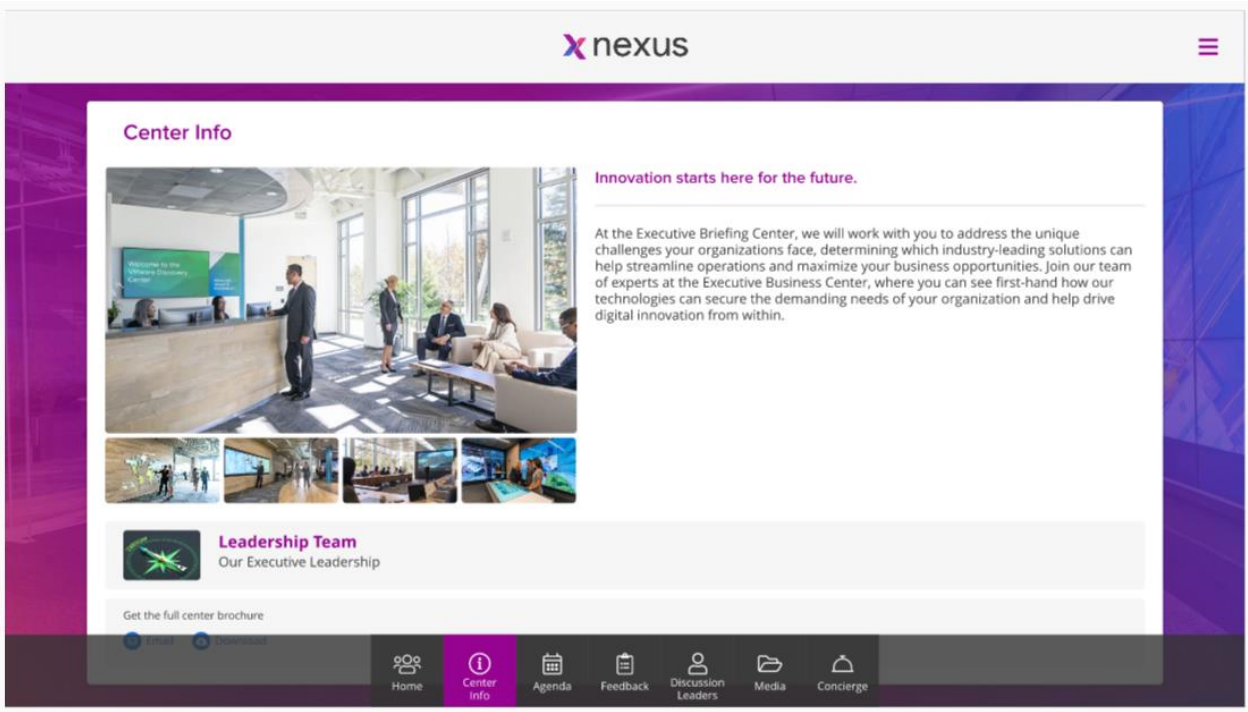


Figure 133. Center Info page

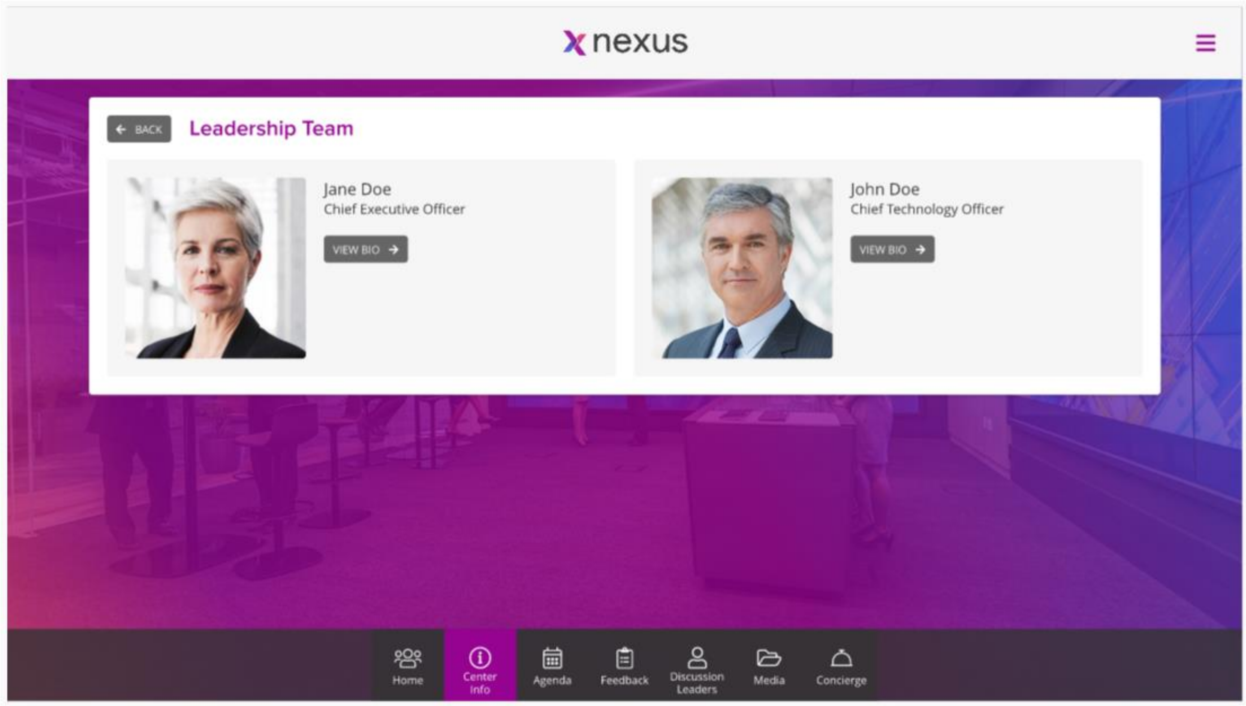


Figure 134. Leadership Team

12.5. AGENDA

On Agenda page Briefing Manager can customize the styles for rating section.

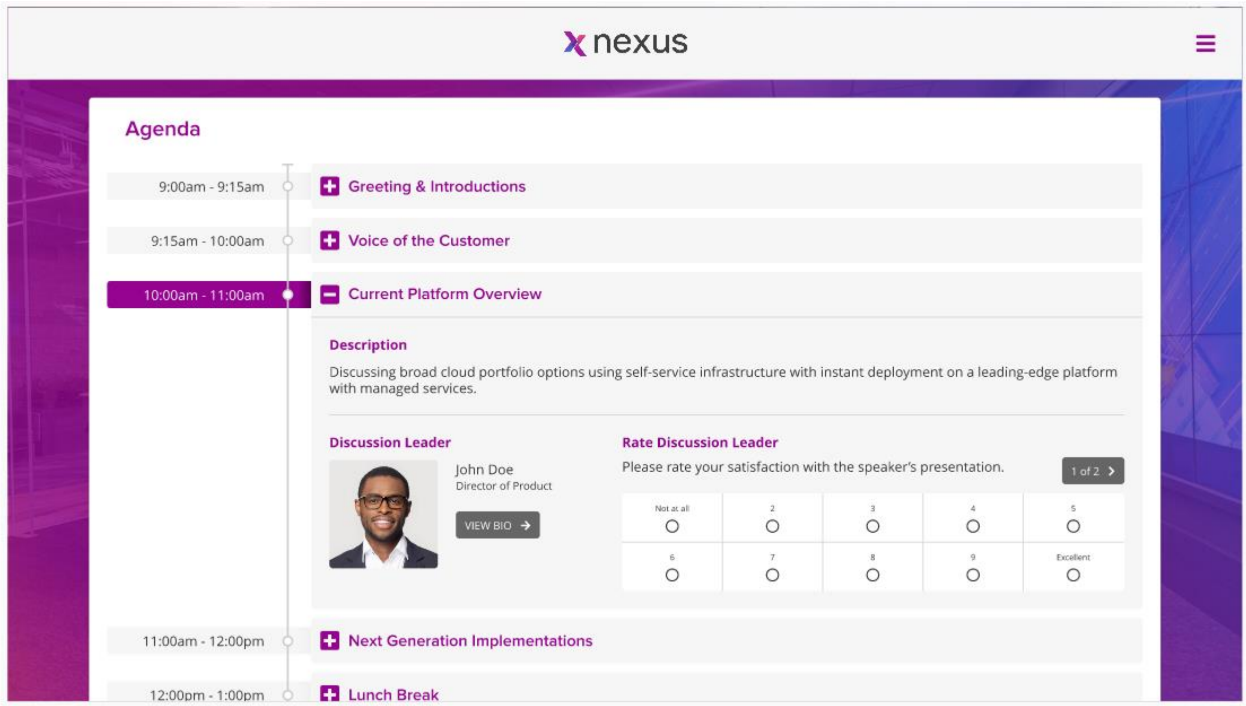
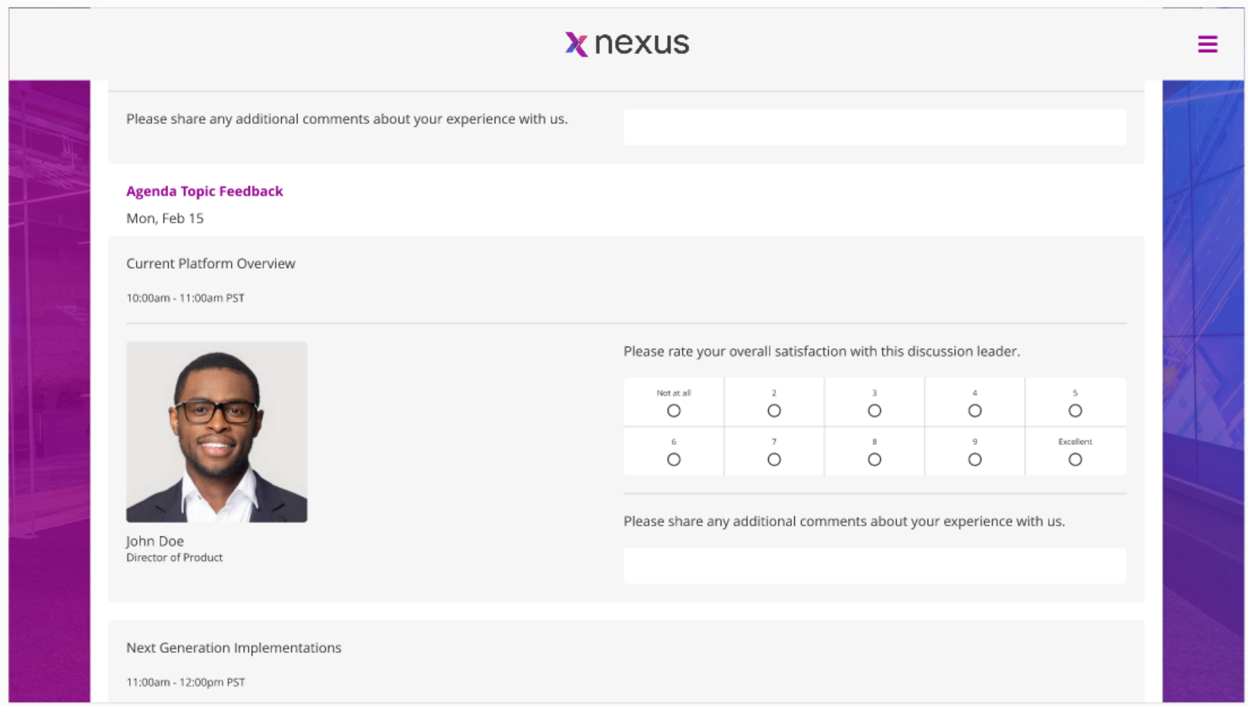


Figure 135. Agenda page with rating section

The same rating styles will be applied to the Feedback form.


nexus
Please share any additional comments about your experience with us.
Agenda Topic Feedback
Mon, Feb 15
Current Platform Overview
10:00am - 11:00am PST
Please rate your overall satisfaction with this discussion leader.
Not at all
2
3
4
5
6
7
8
9
Excellent
John Doe
Director of Product
Please share any additional comments about your experience with us.
Next Generation Implementations
11:00am - 12:00pm PST

SECTION 13: SIGNET PLAYER

13.1. WELCOME SCREEN PRODUCT

The Welcome Screen product will be installing to the devices that located inside the Briefing Center (e.g. screens in the lobby and/or behind the reception)

13.1.1. GENERAL WELCOME SCREEN

The General Welcome screen is the first screen that the attendee should see inside the Briefing Center.

On that screen should be displayed only Greeting Message.

The greeting message should be taken from the CSP: Experience > On-Site Channels > Settings - 'General Welcome Greeting Message Text' field.

General Welcome screen we show with the general background. The system takes the background images uploaded at Experiences – Virtual Screens – Backgrounds menu.

In case we have not background related to the General industry then the system will show the background color.

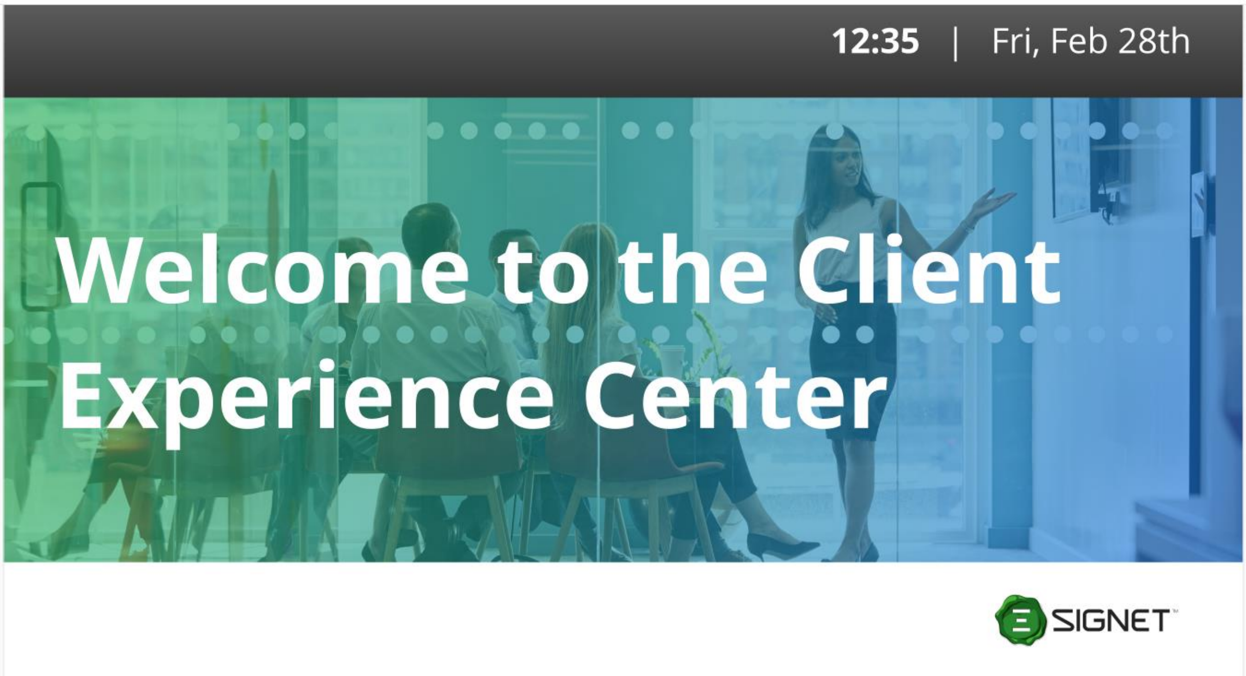


Figure 136.General Welcome screen

RULES WHEN WE SHOW GENERAL WELCOME SCREEN:

1. If there is no briefing scheduled for today in a Center the Signet Player should play on General Welcome screen.

2. If there is at least one briefing scheduled for today in a Center → show General Welcome first and then other carousel screens

3. The Signet Player should play on General Welcome screen if user uncheck all checkboxes on Experiences > On-Site Channels > Welcome Screen > Settings tab

13.1.2. MULTI-CLIENT SCREEN

The Signet Player will play the Multi-Client Welcome screen when more than one briefing has schedule today in the Center.

On the Multi-Client Welcome screen user will see the list with all briefings schedule today.

Multi-Client screen we show with the general background. The system takes the background images uploaded at Experiences – Virtual Screens – Backgrounds menu.

In case we have not background related to the General industry then the system will show the background color.

Multi-Client Welcome screen should be shown the whole day (from 12 am till 12 pm). And user can see all briefings scheduled today even if they are finished.

If there are 2 or 3 briefings scheduled in the Center user should see all these briefings on the one 'Multi-Client Welcome' screen.

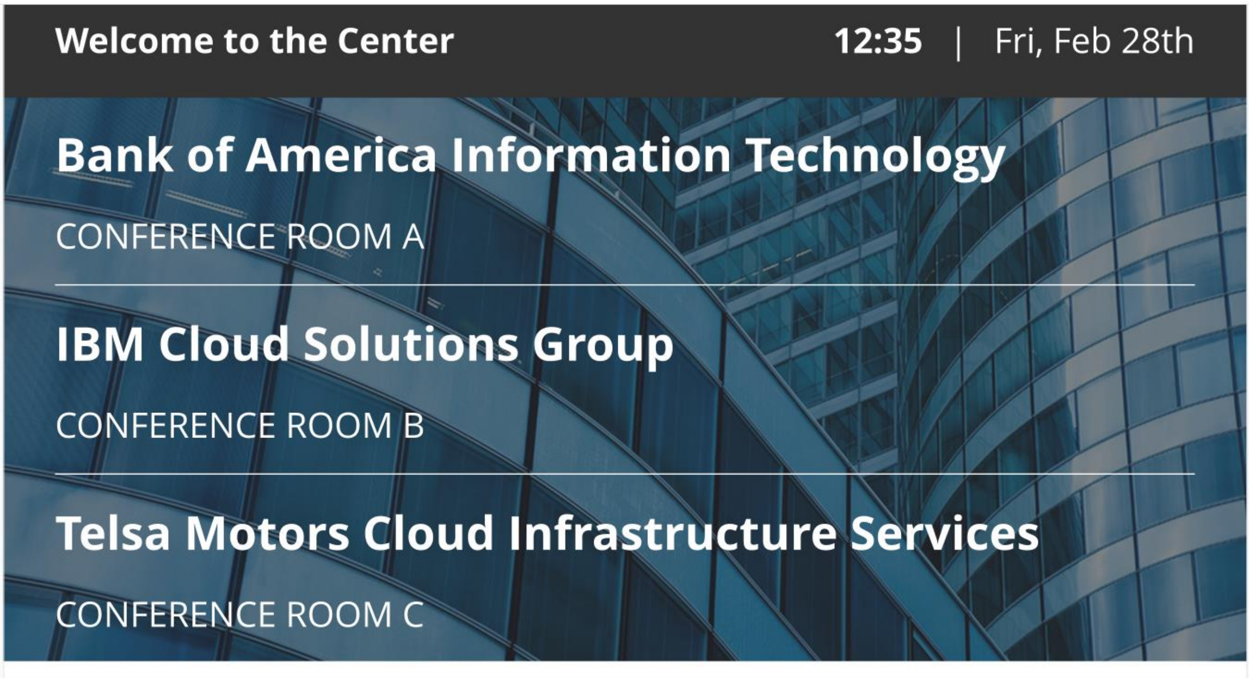


Figure 137. Multi-Client screen with three briefings

If there are 4 and more briefings scheduled in the Center, the briefings should be divided into a max of 6 briefings per screen.

The maximum amount of Multi-Client screens is 4 screens to show up to24 briefings.

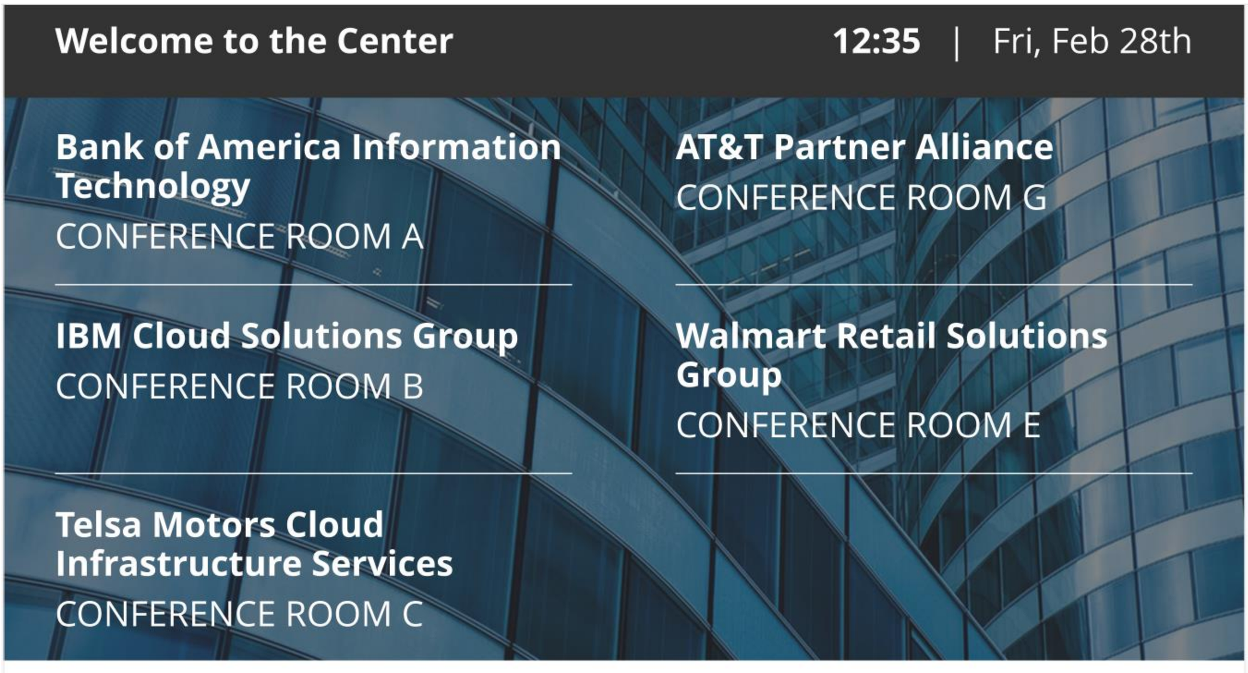


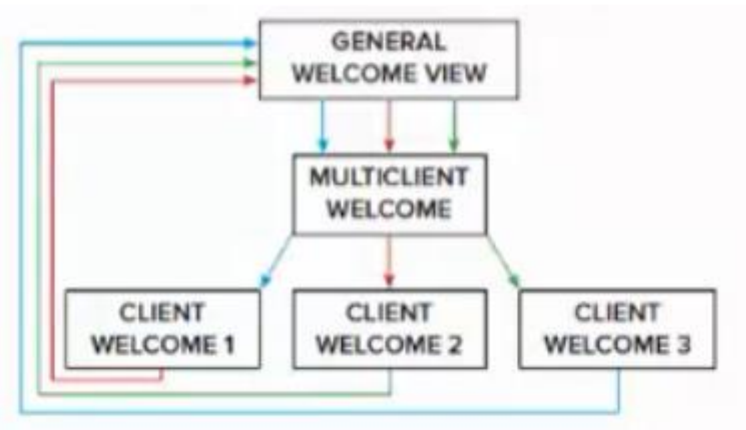
Figure 138. Multi-Client screen with more than three briefings

RULES WHEN WE SHOW CLIENT WELCOME SCREEN:

1. If we have more than one client briefings in the Center then the Signet Player should play next screens:

- General Welcome View
- Multi-Client Welcome
- Client Welcome

A different client will be displayed on the Client Welcome View after each cycle.



13.1.3. CLIENT WELCOME SCREEN

The Client Welcome screen will be shown when at least one briefing has schedule today in the Center.

The Signet Player should play the Client Welcome screen only for briefings with format **In-Person.**

Client Welcome screen we show with the background related to briefing account industry. The system takes the background images uploaded at Experiences – Virtual Screens – Backgrounds menu.

In case user did not upload the background related to the briefing account industry then the system will take the background related to the General industry.

In case we have not background related to the General industry then the system will show the background color.

Figure 139. Client Welcome screen

RULES WHEN WE SHOW CLIENT WELCOME SCREEN:

1. If we have only ONE client briefing in the Center then the Signet Player should play next screens:

- General Welcome screen
- Client Welcome screen

2. If we have more than one client briefings in the Center then the Signet Player should play next screens:

- General Welcome View

- Multi-Client Welcome
- Client Welcome

A different client will be displayed on the Client Welcome View after each cycle.

3. The Client Welcome screen should be shown only for in-person briefings with briefing types checked on Experiences > On-Site Channels > Welcome Screen > Settings tab.

4. Verify 'Pre-Start Time Duration' on the Settings tab and briefing start time to start showing the Client Welcome for that briefing.

5. Verify 'Post-End Time Duration' on the Settings tab and briefing end time to stop showing the Client Welcome for that briefing.

6. The Client Welcome screen should be removed from the play carousel after it has finished "Post-End Time Duration" period.

BEST PRACTICE FROM SCALA PLAYER:

Preconditions:

1. We have one completed briefing (Br.A) and its Post-End Time Duration is still in process.
   - Briefing Duration: 10 am - 11 am
   - Post-End Time Duration (1h - default): 12pm

2. We have a new active briefing (Br.B) and its Pre-Start Time Duration starts.
   - Briefing Duration: 01 pm - 02 pm
   - Pre-Start Time Duration (1h - default): 12pm

Solution:

When Post-End Time Duration for one briefing overlaps the Pre-Start Time Duration for the new briefing the solution is split this time in half

- Post-End Time Duration (1h - default): 11:30pm
- Pre-Start Time Duration (1h - default): 12pm

13.2. ROOM WARMER PRODUCT

The Room Warmer product will be installing to the devices that located inside the meeting room.

13.2.1. GENERAL WELCOME SCREEN

The General Welcome screen is the first screen that the attendee should see inside the meeting room if there are no briefings scheduled for this moment.

On that screen should be displayed Greeting Message and Wi-Fi information.

The greeting message should be taken from the CSP: Experience > On-Site Channels > Room Warmer > Settings - 'General Welcome Greeting Message Text' field.

General Welcome screen we show with the general background. The system takes the background images uploaded at Experiences – Virtual Screens – Backgrounds menu.

In case we have not background related to the General industry then the system will show the background color.

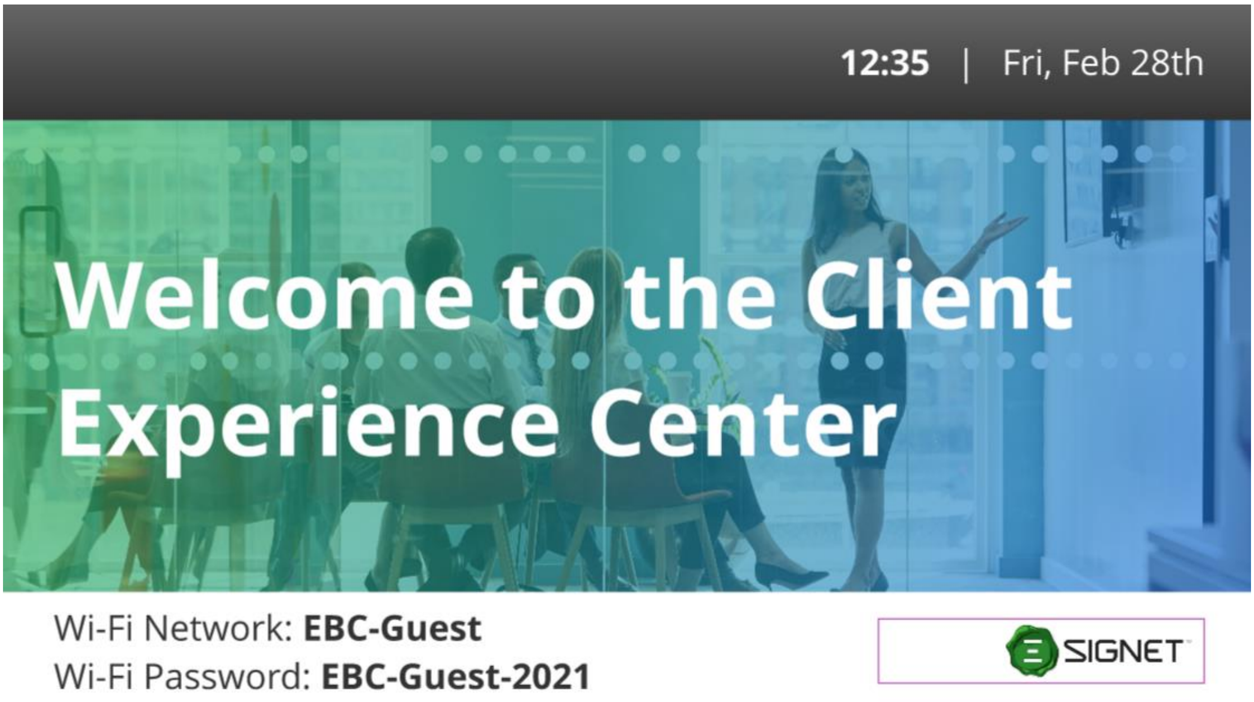


Figure 140. Room Warmer - General Welcome screen

RULES WHEN WE SHOW GENERAL WELCOME SCREEN:

1. General Welcome screen will be displayed only if there are no briefings scheduled in the Center.

2. If there is at least one briefing scheduled for today in a Center → the General Welcome screen will be skipped, and Client Welcome will be shown first and then other carousel screens

13.2.2. CLIENT WELCOME SCREEN

The Client Welcome screen will be shown when at least one briefing has schedule today in the Center.

The Signet Player should play the Client Welcome screen only for briefings with format **In-Person.**

Client Welcome screen we show with the background related to briefing account industry. The system takes the background images uploaded at Experiences – Virtual Screens – Backgrounds menu.

In case user did not upload the background related to the briefing account industry then the system will take the background related to the General industry.

In case we have not background related to the General industry then the system will show the background color.

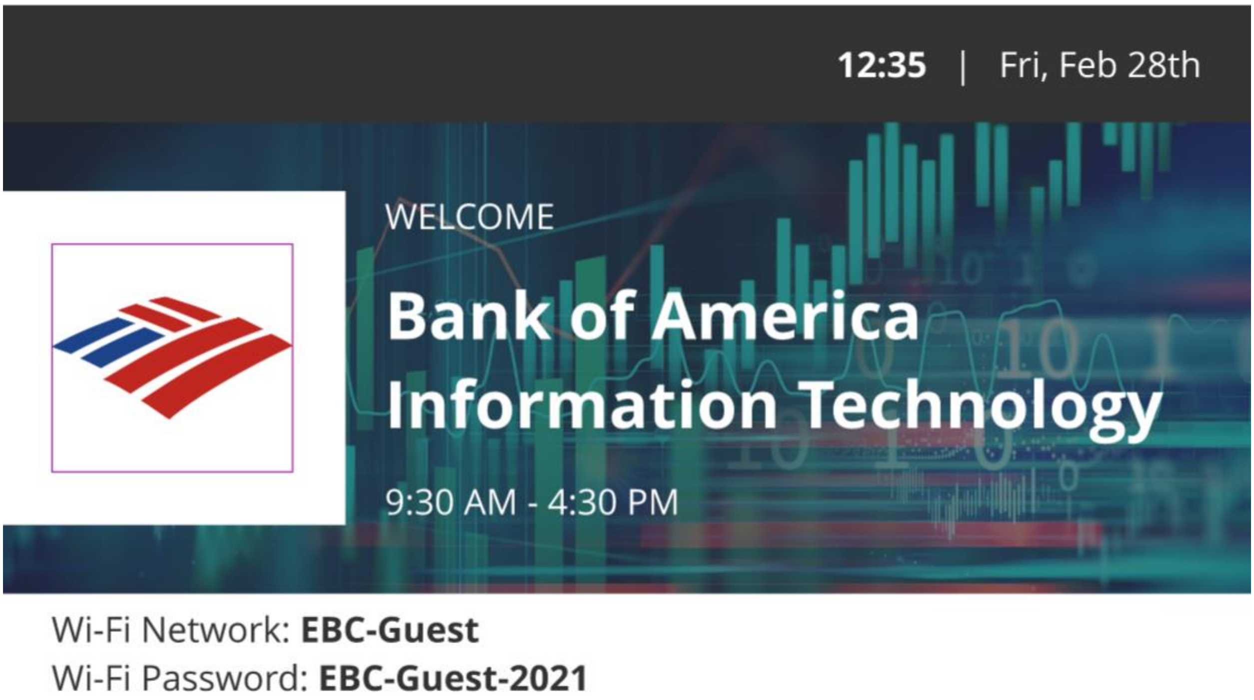


Figure 141. Room Warmer - Client Welcome screen

RULES WHEN WE SHOW CLIENT WELCOME SCREEN:

1. If we have a briefing in the room then on the RW product we should show the next screens:

- The Client Welcome screen should be shown first
- Agenda View screen is the next one

2. Verify 'Pre-Start Time Duration' on the Settings tab and briefing start time to start showing the Client Welcome for that briefing.

3. Verify 'Post-End Time Duration' on the Settings tab and briefing end time to stop showing the Client Welcome for that briefing.

4. The Client Welcome screen should be removed from the play carousel after it has finished "Post-End Time Duration" period.

BEST PRACTICE FROM SCALA PLAYER:

Preconditions:

1. We have one completed briefing (Br.A) and its Post-End Time Duration is still in process.
   - Briefing Duration: 10 am - 11 am
   - Post-End Time Duration (1h - default): 12pm
2. We have a new active briefing (Br.B) and its Pre-Start Time Duration starts.
   - Briefing Duration: 01 pm - 02 pm
   - Pre-Start Time Duration (1h - default): 12pm

Solution:

When Post-End Time Duration for one briefing overlaps the Pre-Start Time Duration for the new briefing the solution is split this time in half

- Post-End Time Duration (1h - default): 11:30pm
- Pre-Start Time Duration (1h - default): 12pm

13.2.3. AGENDA VIEW SCREEN

The "Agenda View" screen should be shown right after the Client Welcome screen.

When the pre-briefing period has started user sees the Client Welcome and Agenda View screens.

Agenda View screen we show with the background related to briefing account industry. The system takes the background images uploaded at Experiences – Virtual Screens – Backgrounds menu.

In case user did not upload the background related to the briefing account industry then the system will take the background related to the General industry.

In case we have not background related to the General industry then the system will show the background color.

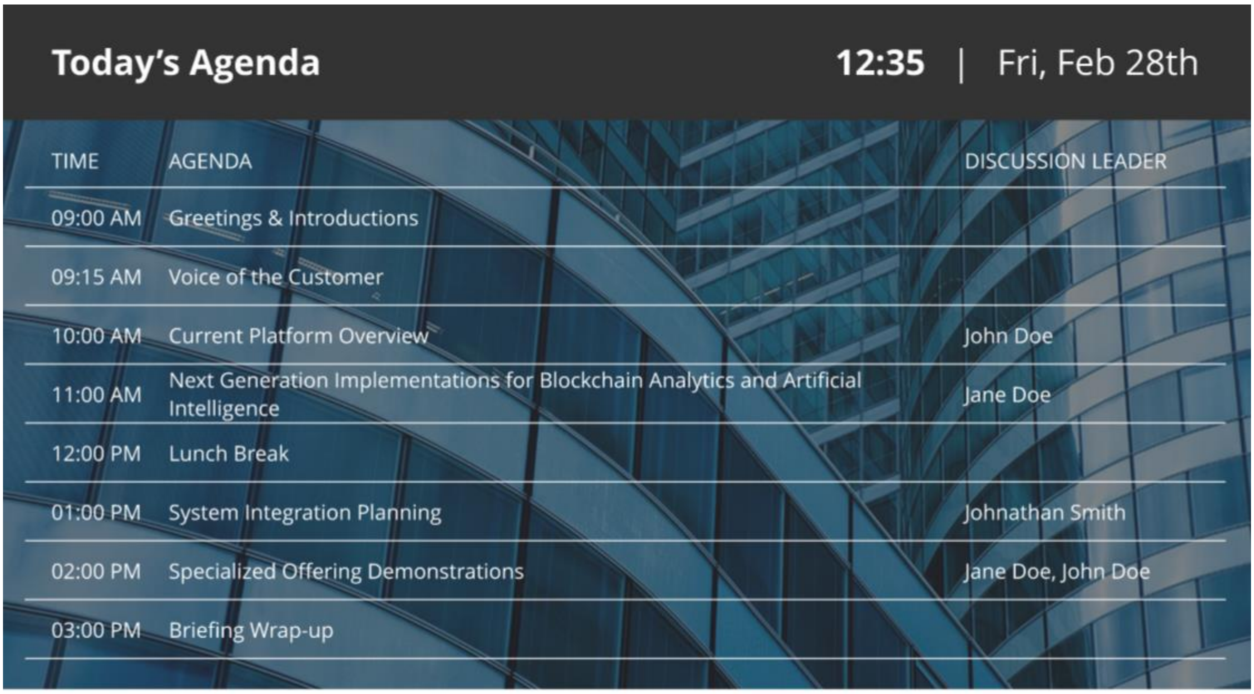


Figure 142. Room Warmer - Agenda View screen

The "Agenda View" screen should be displayed without linking to the first agenda item start time.

The Agenda View screen should be displayed before the post-briefing period ended.

The agenda list - max 8 items.

- If we have 8 agenda topics for a briefing, then on the Agenda Views screen should be displayed all topics and the agenda items should not be removed from the screen.
- If we have more than 8 agenda topics for a briefing, then the ended agenda topic should be removed from the top of the Agenda Views screen. The next agenda topic that didn't fit on the screen (e.g. topic #9) will be added to the bottom of the agenda list.

13.3. DOOR MONITOR PRODUCT

The Door Monitor product will be located near the meeting room and Briefing Center's visitors can see a general information about the briefing.

SCREEN RESOLUTIONS:

- Landscape Door Monitor 1920x1280
- Portrait Door Monitor 1280x1920

13.3.1. GENERAL WELCOME SCREEN

The General Welcome screen is the first screen that the attendee should see inside the meeting room if there are no briefings scheduled for this moment.

On that screen should be displayed General Welcome Greeting Message Text.

The greeting message should be taken from the CSP: Experience > On-Site Channels > Door Monitor > Settings - 'General Welcome Greeting Message Text' field.

General Welcome screen we show with the general background. The system takes the background images uploaded at Experiences – Virtual Screens – Backgrounds menu.

In case the user uploaded more than one industry background it will be changing based on the duration specified in the Settings → "Background Image Time Duration"

In case we have not background related to the General industry then the system will show the background color.

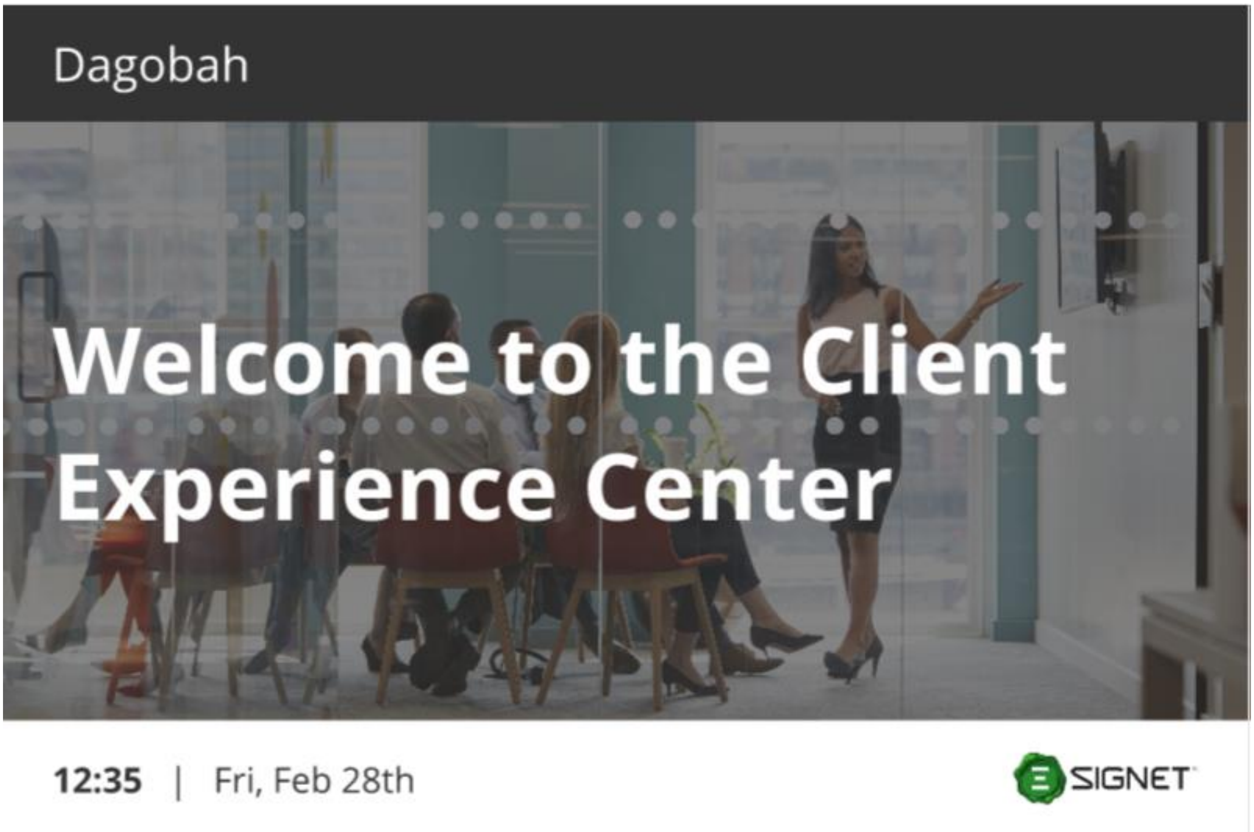


Figure 143. Door Monitor - General Welcome

RULES WHEN WE SHOW GENERAL WELCOME SCREEN:

1. If there is no briefing scheduled for today in a Center the Signet Player should play on General Welcome screen.

2. The General Welcome screen will be changed to the Client Welcome when the pre-start briefing duration has started

3. After the post-end briefing duration has finished user sees only the General Welcome screen.

13.3.2. CLIENT WELCOME SCREEN

The Client Welcome screen will be displayed during the pre-start / briefing duration and post-end duration specified in the Settings.

The Signet Player should play the Client Welcome screen only for briefings with format In-Person.

Multi-Account Briefings will not show any logos on the Client Welcome screen. In this case, the Client Welcome "No Logo" view will be shown.

Client Welcome screen we show with the background related to briefing account industry. The system takes the background images uploaded at Experiences – Virtual Screens –

Backgrounds menu. In case the user uploaded more than one industry background it will be changing based on the duration specified in the Settings → "Background Image Time Duration".

In case user did not upload the background related to the briefing account industry then the system will take the background related to the General industry.

In case we have not background related to the General industry then the system will show the background color.

The industry for multi-accounts briefings will be "General" and backgrounds with industry "General" will be shown.

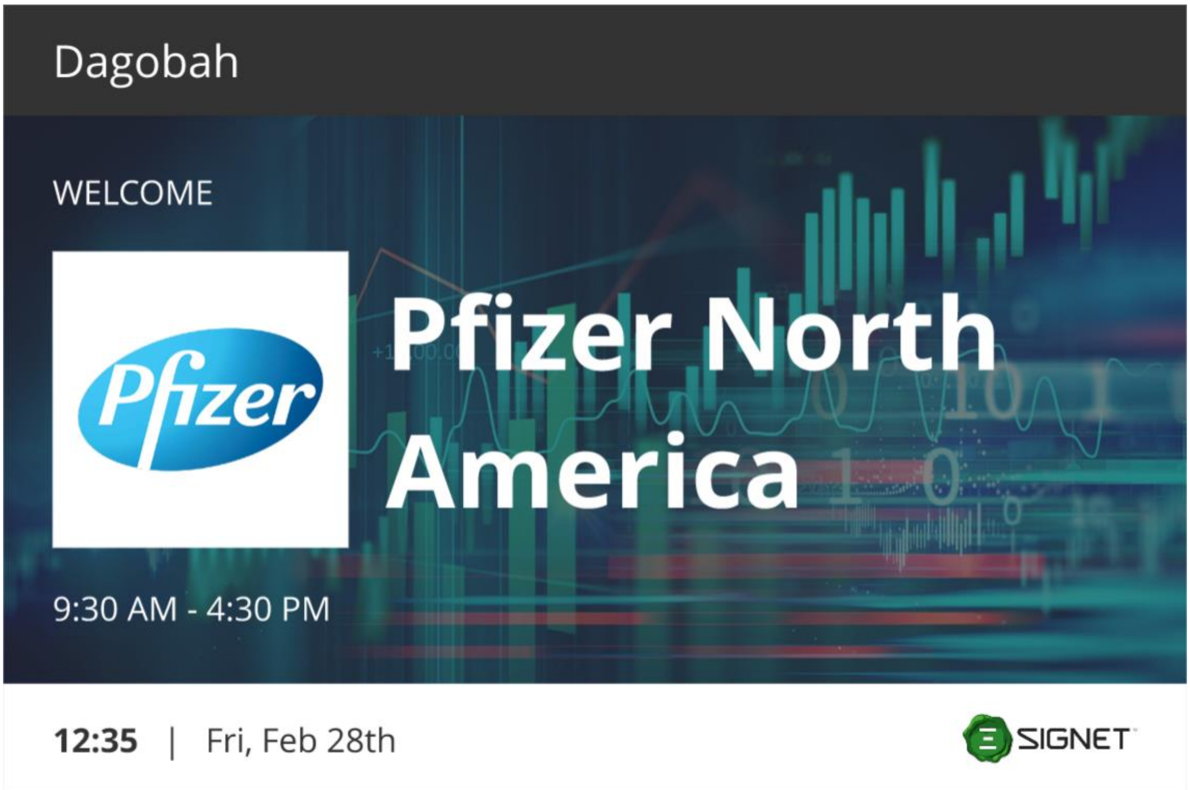


Figure 144. Door Monitor - Client Welcome

RULES WHEN WE SHOW CLIENT WELCOME SCREEN:

1. If we have a briefing in the room then on the DM product, we should show the next screens: Only Client Welcome screen should be shown

2. Verify 'Pre-Start Time Duration' on the Settings tab and briefing start time to start showing the Client Welcome for that briefing.

3. Verify 'Post-End Time Duration' on the Settings tab and briefing end time to stop showing the Client Welcome for that briefing.

4. The Client Welcome screen should be removed from the play carousel after it has finished "Post-End Time Duration" period.

13.3.3. CLIENT WELCOME SCREEN FOR THE PRIVATE BRIEFING

User sees the Client Welcome - Private Briefing screen if the appropriate toggle ("Private Briefing") inside the Briefing Overview → Experience tab turned on.

The Client Welcome – Private screen will be displayed during the pre-start / briefing duration and post-end duration specified in the Settings.

The Signet Player should play the Client Welcome screen only for briefings with format **In-Person.**

Private Client Welcome screen will show the backgrounds related to the "General" industry. The system takes the background images uploaded at Experiences – Virtual Screens – Backgrounds menu. In case the user uploaded more than one industry background it will be changing based on the duration specified in the Settings → "Background Image Time Duration".

In case we have not background related to the General industry then the system will show the background color.

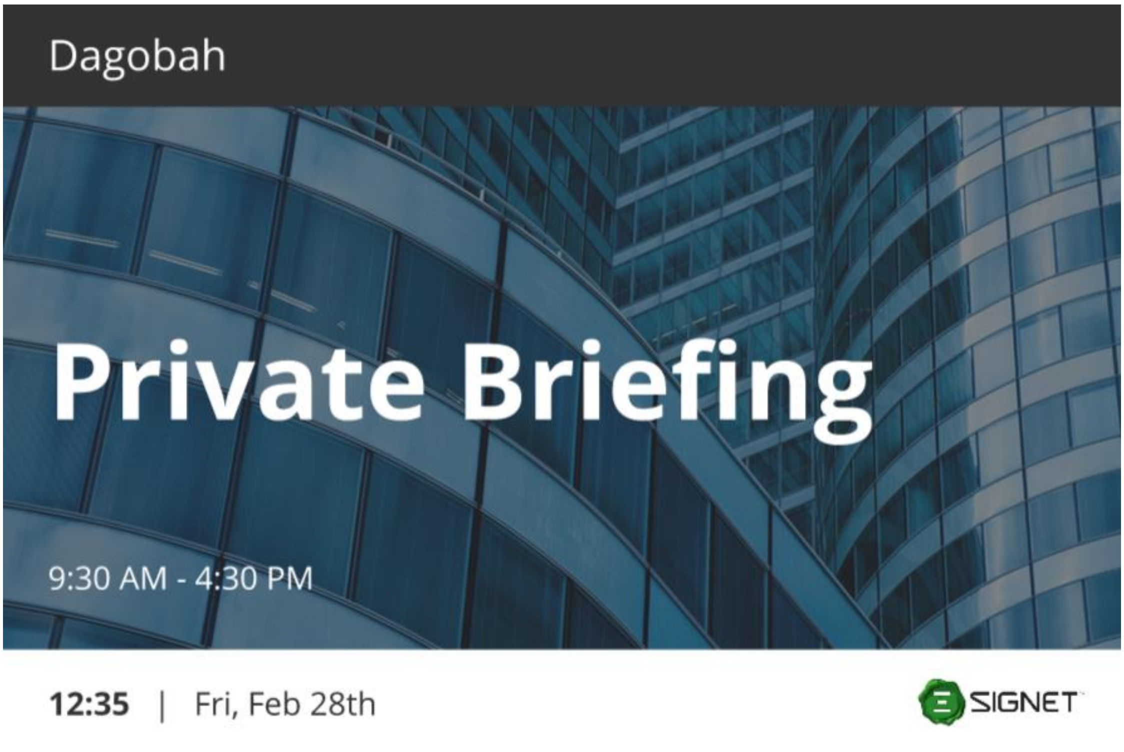


Figure 145. Door Monitor - Private Briefing

RULES WHEN WE SHOW PRIVATE CLIENT WELCOME SCREEN:

1. If we have a private briefing in the room then on the DM product, we should show the next screens: Only Private Client Welcome screen should be shown

2. Verify 'Pre-Start Time Duration' on the Settings tab and briefing start time to start showing the Private Client Welcome for that briefing.

3. Verify ‘Post-End Time Duration’ on the Settings tab and briefing end time to stop showing the Private Client Welcome for that briefing.

4. The Private Client Welcome screen should be removed from the play carousel after it has finished “Post-End Time Duration” period.

13.4. MEDIA CHANNEL PRODUCT

The Media Channel product will be installing to the devices for the entertaining purposes for the users to add content.

Media that will be turned on the “Playback” page will be displayed on the SP[MD] in the exact same order.

All media (image/video) added to the Media Channel’s playback will be displayed on the SP no matter which industry will be chosen for such media.

The media should play on the full screen.

The image duration during the Media Channel’s playback will be hardcoded and equal to 20 seconds by default.

If the media item is a video (max file size 2Gb), it will play its natural file duration.

In case no media were added to the Media Channel playback - SP will show a black screen.