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Release Notes January - October 2024

Highlights:

AI Concierge:

1. The new Public Knowledge feature enables the AI Concierge to address inquiries on a wide range of topics specified by admin using LLM's extensive public knowledge.
2. When you ingest PDF and on-demand video data sources, the AI Concierge automatically generates summaries, and extracts topics, companies and products discussed in the data source, and suggests questions the attendees could ask about the data source.

Integration:

1. Engagez now supports two-way integration with **Salesforce** for registration and attendee status data
2. Engagez now supports two-way integration with **Hubspot** for registration and attendee status data
3. Engagez now supports integration with **Accredible** Certificates that can be turned on under Integrations.

Webinar and EZ Live:

1. We now support two types of Webinar venues: Webinar Singles and Webinar Series. Webinar Single type venue offers any number of independent webinars, each with its own landing page, registration and analytics. Webinar Series type venue enables hosting any number of webinars with a shared entrance page, registration and analytics.
2. We've introduced a Waiting Room feature to manage attendees entering an EZ Live Session.
3. Live Closed Captioning is now available for Reduced and Standard Latency EZ Live broadcasts.

Physical Event Check In:

1. The Check-In feature for hybrid and in-person events has received a major UI and functionality update, enhancing the experience for staff managing attendee check-ins.

Essentials Admin Page

- The option to make venue agenda be searchable by external search engines has moved to Essentials > Access and Type.
- To use a venue as a persistent destination, with no close date, you can now turn off the Close Date option altogether (before you might have been setting the Close Date to a date far in the future!).
- A new date field called On Demand Start Date has been added to Essentials. Certain analytics features in the platform use this date to report on activities explicitly taking

place during the on-demand vs live portion of the event. This date must be set to a value in between the Open and Close Date of the venue. It can be the same as the Close Date.

Check-In

- The Check-In feature for hybrid and in-person events has received a major UI and functionality update, enhancing the experience for staff managing attendee check-ins. This update includes improved Auto Mode rule setup, a new My Scans tab to track all check-in actions made by staff, and a Staff Notes feature, allowing staff members to record notes on attendees they've interacted with and share them with colleagues.

Entrance

- There is now a new Speakers panel that you can add to your venue's Entrance page. This enables promoting the upcoming event speakers to those contemplating to register to attend the event.

Registration/Sign-In

- The Registration Form editor now has added configurability with an HTML and rich text-enabled Description field.

AI Concierge

- Introduced the ability to bulk name a group of data sources uploaded simultaneously in AI Settings, enhancing organization and clarity.
- The new Public Knowledge feature enables the AI Concierge to address inquiries on a wide range of topics specified by admin using LLM's extensive public knowledge. For instance, you can type "transportation" to include broad information about transportation. To get more specific, you can enter detailed text like "Transportation to and from hotels near Moscone Center in San Francisco" to include more targeted info. Users asking questions will only be able to access LLM knowledge on topics that are specified by admin, they will not have access to the broader sector of LLM knowledge found in a traditional LLM chat bot.
- ASK AI functionality is now available on mobile devices.
- The AI can now provide attendees with a detailed Summary, Keywords, Topics and Suggested Questions for a venue Resource that has been added to the Data Sources in AI Settings.
    - When a user opens a Resource they can access these features by selecting the Details button in the Resource pop-up.
- The AI can provide a detailed Summary, Topics and Suggested Questions for a venue Session that has been added to the Data Sources in AI Settings. It pulls data from the Session's description and metadata, as well as the session transcript if there is one available. It can also identify and display Organizations, Products, and Industries that are mentioned in the Session.

    - Before a user enters a session, they can select Read More about the Session Description in the Calendar Panel or On Demand Panel to access the AI information and begin learning more by selecting ASK AI questions.
    - Once a user has entered a Session they can access this same information by selecting the About button within the Session.
- Sessions can now be indexed as Data Sources to train the AI. Admins can now index the title and description for all existing sessions. If a session includes on-demand or simulive transcripts, an optional checkbox allows for transcript indexing alongside the session metadata. This feature also enables users to index session metadata first and add transcript indexing later.
- Admins can now edit the title and the link to the webpage of an existing PDF after it has been added as a data source.
- A new Data Source type, Text Snippet, has been introduced, allowing admin to paste plain text directly into the pop-up to be utilized by the AI. Admin also have the option to input a URL, which will appear as the source whenever the snippet's information is used to answer a question.
- Now when the AI does not have enough information to answer the question, a “No Answer” response message can be configured and given the option of including a Contact Card of a venue admin for the user to reach out to for more information.

Staff Assistant

- The new Potential Accounts feature dynamically groups attendees that share the same email domain that has not been associated with an account yet. The system automatically groups all email addresses matching the pattern “@<domain name>.*”. For example, if one person registers with "engagez.com" and another with "engagez.net," they will be grouped under a single "engagez" Potential Account.
- When creating an account in Staff Assistant, you can select Access Groups to automatically assign members to the account.
- In Staff Assistant, you can now customize the Welcome Message for Account members with variables from their profile for added personalization.
- A permanent Default Account has been added to the Accounts area, which cannot be deleted. The Default Account is assigned to users who do not have a designated sales representative and are not part of an Account.
- Added Swap Staff functionality, allowing managers to easily replace a staff member and her assignments with another.
- Access to the Staff Assistant can be controlled by the Visibility setting with the option to restrict access to only Admins, Managers, or Staff.

Segmentation Rules

- Business Rules that used to be found in the Operations Console can now be found as Segmentation Rules, as a tab in Staff Assistant.
- When Staff Assistant is enabled, Segmentation Rules can now be set up to automatically assign staff members to attendees based on specific conditions or values in their profile.

- Segmentation Rules can now be set up to automatically assign an Access Group(s) to attendees based on specific conditions or values in their profile.
- Segmentation Rules can now be Exported and Imported by CSV file.

EZ Live

- Waiting Room Feature: We've introduced a Waiting Room feature to manage attendees entering an EZ Live Session. When enabled, attendees who join the session will be placed in a private waiting room where they cannot see or interact with others or view the ongoing session. Organizers will be notified of their arrival by a pop-up and can admit them when appropriate either through the pop-up or in the Participant's tab. This Waiting Room feature can be toggled on/off by editing the EZ Live Session.
- A new option has been added for admins when they select a user in the Participant's tab in EZ Live which allows them to turn off that user's Video Background in case of performance issues on the user's side.
- Now when attending an EZ Live session all Interactions, like Chat, Q&A, Resources, etc. as well as Microphone, Camera, and Layout settings can be accessed in fullscreen mode upon mouse hover to allow for easier user engagement.
- Live Closed Captioning is now available for Reduced and Standard Latency EZ Live broadcasts.

Sessions

- Within sessions, the Resources pop-up can now be displayed as a tab within the Engagement Panel on the right-hand side. This is configured in Edit Session > Interactions.
- In Session Q&A users can now tag other users, which notifies them by email that they have been tagged in a discussion.
- The Calendar Panel Settings that include Live Session Label, Allow Early Entry, Automatic Transition, and Allow Entry into Past sessions has moved from the Calendar Panel into Default Settings in the Admin back-end side of Sessions.
- The Invite Others feature has been updated to a copy and paste model that includes the name of the Session, the Date and Time, and the Join Link. Now admins can easily copy and paste the session info to send to an invitee.

Attendees

- Admins now have the ability to remove users in bulk by going to Operations Console > Reset Venue > Remove Members by email and entering the emails of those they wish to remove separated by commas.
- We've added a Change Owner option at both the Venue and Hall Item levels, allowing admins to transfer ownership. This change can be made by selecting the dropdown next to the current owner's name in the Attendees section of the Venue or Hall Item and assigning an existing venue admin to replace the current owner. The previous owner will remain an admin but will no longer be the owner. If the current owner is in charge of multiple hall items there will be an option to bulk change the ownership by selecting a checkbox.

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Media Library

- When selecting a Media Library asset for a panel, the Media Library will automatically open to the location of the currently selected asset, if one is available.
- Media Assets can now be renamed once in the Media Library by selecting the pencil icon next to the asset name under Properties.
- Now when uploading an MP3 file to the media library, you now have the option to generate Closed Captions and download the VTT file, as well as have them translated to multiple other languages.

Analytics

- Analytics are now available for AI under Analytics > AI Concierge, including data on the attendee who utilized the chat, a summary of and statistics on the chat, and data sources that were utilized.
- We now provide analytics for when a user interacts with another person's business card by clicking on actions such as Message, Video Call, or Book a Meeting, and report these in the 1on1 Engagements Actions CSV under Analytics > Attendees. This report also includes click tracking for the Ask AI, Staff Assistant, and Talk to us features.
- Analytics reports can now be run that include data from all hall items within an Exhibit, Collaboration Room, or Webinar Series.
- In Attendee Analytics we now include distinct columns for both Gamification Score and Engagement Score.

Webinars

- Speaker Panels are now available to be added in Webinar hall items.
- In Webinar Schedule admin can now specify a time to allow attendees early-entry into the session.
- Webinar venues have now been split into two distinct types: Webinar, which offers one webinar location with the option to set up multiple sessions, and Webinar Series, which offers the ability to set up multiple Webinar items in the same venue.

Integrations

- 3rd Party Integrations have moved from Features to their own section in the Admin menu named Integrations.
- In a Hall Item's Zoom integration settings, the current settings can be applied to all other items within the hall by checking the box next to "Apply these settings to all sessions in this hall."
- Engagez now supports two-way integration with Salesforce for registration data. When pushing from Engagez to Salesforce, users register through Engagez, their data is either matched to an existing contact or lead in Salesforce or a new record is created, with attendance data updated in the campaign member object upon sign-in. For pulling from Salesforce to Engagez, users register via Salesforce, a record is created in Engagez enabling sign-in, and the attendance status is synced back to Salesforce.
- Engagez has expanded our integration with Hubspot to include the option to push Registrant information from Engagez to Hubspot in a Marketing Event, as well as the

ability to automatically pull registrations from a Hubspot Form into Engagez with the use of a webhook.
- The UI and functionality of the Engagez API integration has been updated to allow admins to create multiple API keys, keep track of how many they have created, and delete API keys when they are no longer needed.

Locations
- Location backgrounds and pre-background videos now support auto-fitting by either the height or width of the selected photo or video in Location Edit Style.

Getting Started Pop-up
- The edit Getting Started section has moved to Locations/Pop-ups, the toggle to turn on the Getting Started feature remains in Features.
- When setting up the Getting Started pop-up, access to each individual page can now be customized based on current system roles: admin, contributor, staff, and speaker.
- When testing Multi-Page Onboarding, if any page has Access Group/Role restrictions, a dropdown next to Test All Pages will prompt the user to select the Access Group(s)/Role they wish to simulate. Only the pages visible to those specific access groups will be displayed for ease of testing.
- The Getting Started pop-up can now be added as a menu item. Once configured in the Menu settings, clicking on the Getting Started option will display the same pop-up that users see when they first enter the venue.

Forms
- The Copy function for forms has been added to each form's Actions menu for easier access. You can select the venue to copy the form to, and optionally choose a specific hall item.

Certificates and Badges
- Engagez now supports an integration with Accredible Certificates that can be turned on under Integrations. User info from Engagez can be used as variables in the Accredible certificate, and rules can be configured to issue these certificates based on Session Attendence, Access Groups, and more in the Certificates tab.
- When adding a QR code to a Badge, the background and foreground colors of the WR code can now be customized.
- Admins now have the option to customize the layout when exporting a batch of certificates or badges to PDF. They can choose how many items to display per page and set the number of columns, making it especially useful for printing badges.

Profile
- The Edit Profile pop-up has been redesigned to streamline the profile completion process and help users quickly view and update their profile information with ease.

Panels

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- Admins can now align multiple panels simultaneously by selecting the first panel, holding Shift, and selecting one or more additional panels. Right-clicking within any selected panel opens a menu with options to Align the panels relative to the first panel, or to Distribute or Center them on the page or relative to each other.
- The Edit Style pop-ups for panels have been completely redesigned to simplify panel customization. The interface now features four distinct tabs: Content, Style, Position, and Advanced, making it easier to navigate and customize each aspect of the panel.

Social Lounge Panel

- For Polls within the Social Lounge panel, admins can now download a CSV report with the results of the poll by clicking the Download Poll Report button in the dropdown in the upper right hand corner of the panel.
- For the Leadership Board we now support only showing the current user their own score and nobody else’s by setting the Top # of Attendees Listed to 0 in the Gamification Score Settings.

Agenda

- Now in My Agenda, Speakers / Producers / Moderators will automatically see any session they are assigned to listed in their Agenda.