



# Managing an Event (Ncompass Toolbar)

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# Introduction

- **Whenever an event is scheduled the event tool bar will appear. The tool bar will be located on the bottom or right side of the screen. The options include: manage publication, request webcast, notify participants, edit event, cancel event, manage attachments and print.**

[Avanc](#)

Home

**Jun 2014**  
**20**  
**Friday**  
 08:45-10:00  
 36154245  
**learning**

[From Soup To Tomatoes - Basic](#) ((( ))) WEBCAST  
 Presented By: Renee Desjardins RN, Certified Personal & Older Adult Training Specialist  
 An armchair-based exercise program

Espanola  
[\(Soup Basic Poster.pub\)](#) [\(Soup Evaluation form OTN.doc\)](#)  
[\(Soup info poster for 3 classes.pub\)](#)

**Jun 2014**  
**20**  
**Friday**  
 10:00-10:50  
 36157346  
**learning**

[From Soup To Tomatoes - Gentle](#) ((( ))) WEBCAST  
 Presented By: Renee Desjardins RN, Certified Personal & Older Adult Training Specialist  
 An armchair-based exercise program

Espanola  
[\(Soup Gentle Poster.pub\)](#) [\(Soup Evaluation form OTN.doc\)](#)  
[\(Soup info poster for 3 classes.pub\)](#)

**Jun 2014**  
**20**  
**Friday**  
 10:50-11:40  
 36159620  
**learning**

[From Soup To Tomatoes - Yoga](#) ((( ))) WEBCAST  
 Presented By: Renee Desjardins RN, Certified Personal & Older Adult Training Specialist  
 An armchair-based exercise program

Espanola  
[\(Soup Yoga Poster.pub\)](#) [\(Soup Evaluation form OTN.doc\)](#)  
[\(Soup info poster for 3 classes.pub\)](#)

June 2014						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
	8	9	10	11	12	13
	15	16	17	18	19	20
	22	23	24	25	26	27
	29	30	1	2	3	4
6	7	8	9	10	11	12

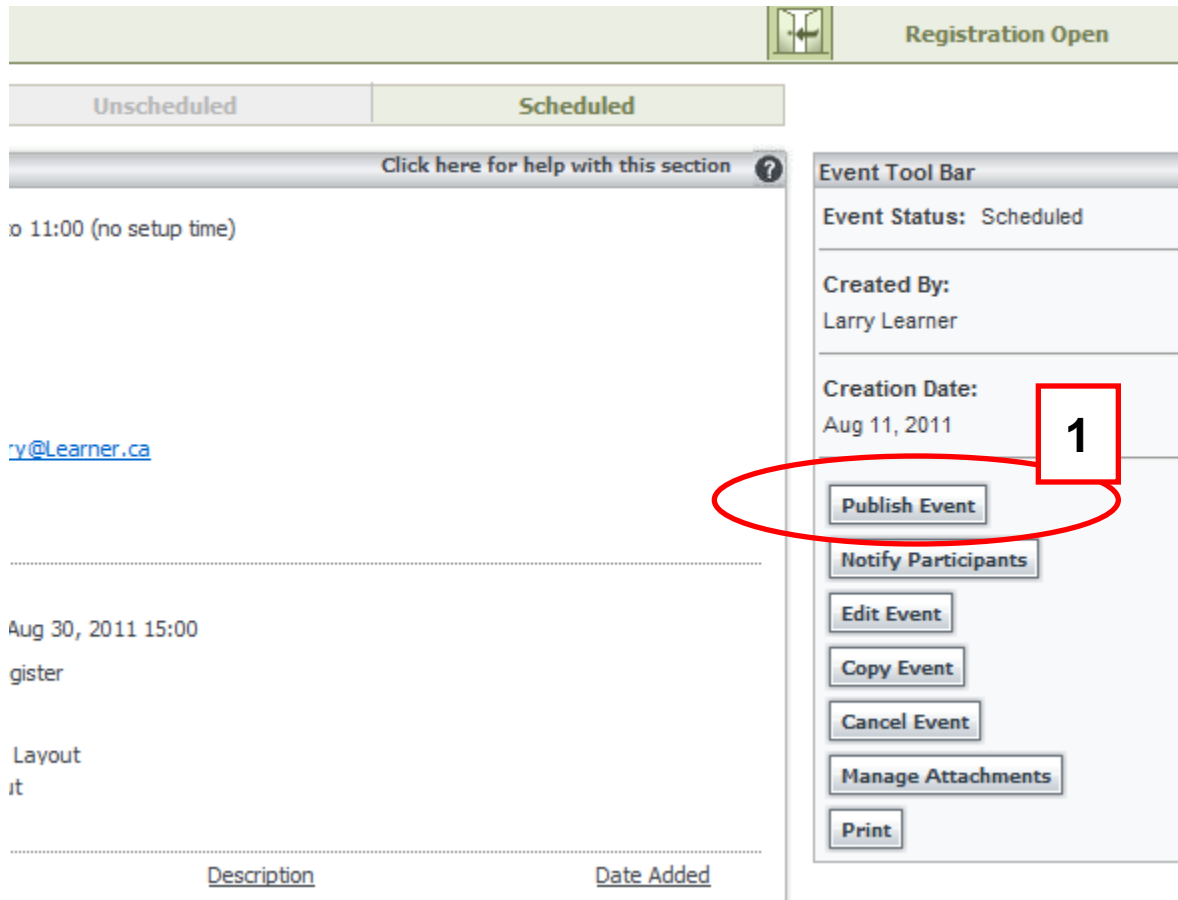
**Personal Learning Alerts**

[Manage](#)  
[Create](#)

- [Ncompass](#)
- [Resource Library](#)
- [Webcasting Centre](#)
- [E-Training Centre](#)
- [OTN Telemedicine Directory](#)
- [See your patients via OTN](#)

If you're hosting an open public educational event, then you'll probably need to publish the event in OTN's Learning Centre. In this way you will be able widen the group of attendees that will join the event.

## Publishing Your Event



The screenshot displays the Ncompass interface for event management. At the top, there is a navigation bar with a left arrow icon and the text "Registration Open". Below this, there are tabs for "Unscheduled" and "Scheduled". A help link "Click here for help with this section" is visible. The main content area shows event details for a scheduled event on August 30, 2011, at 15:00. The "Event Tool Bar" on the right side contains several buttons: "Publish Event", "Notify Participants", "Edit Event", "Copy Event", "Cancel Event", "Manage Attachments", and "Print". The "Publish Event" button is circled in red, and a red box with the number "1" is placed next to it.

**[1]** To publish your event, locate the event and click the Publish Event button located to the right of the screen. You will now be brought to the Manage Publication screen where you can adjust the publication options for the given event.

## Publishing Your Event

Manage Publication #14566563

New    Unscheduled    **Scheduled**

**Reservation Details** [Click here for help with this section](#) ?

Date: Aug 31, 2011  
 Event Time: Aug 31, 2011 - 10:00 to 11:00 (no setup time)  
 Event Title: **Hay Fever**

**Publication Options** [Click here for help with this section](#) ?

Participant Fees:  Yes  No

Publish Location: Your event will be published to both the Learning Centre and the Ncompass Public Events List.

2

3

**Event Tool Bar**

Status: Scheduled  
 Created By:  
 Larry Learner  
 Creation Date: **Aug 11, 2011**

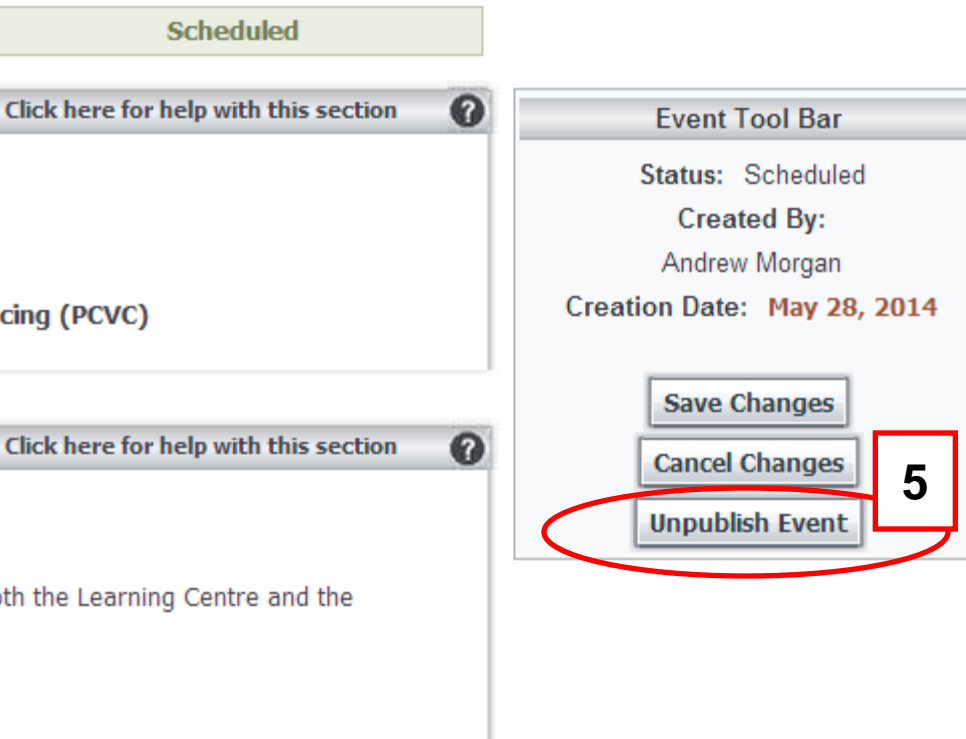
4

[2] The first option allows you to select whether there are participant fees associated with the event.

[3] All published events can be viewed in both the Learning Centre (learning.otn.ca) and the Ncompass Public Events listing.

[4] Select the Publish Event button to finalize your selections.

## Publishing Your Event



The screenshot shows the 'Event Tool Bar' interface. At the top, there is a 'Scheduled' tab. Below it, there are two help links: 'Click here for help with this section' with a question mark icon. The main content area displays the following information:

- Status: Scheduled
- Created By: Andrew Morgan
- Creation Date: May 28, 2014

Below the information, there are three buttons: 'Save Changes', 'Cancel Changes', and 'Unpublish Event'. The 'Unpublish Event' button is circled in red, and a red box with the number '5' is placed next to it.

**[5]** At anytime you need to “unpublish” your event, please click the Manage Publication button and select the Unpublish Event button located on the right side of the screen in the toolbar.



Webcasting is a popular service that enables members to record their videoconference so that others can view the event from their computers on demand.



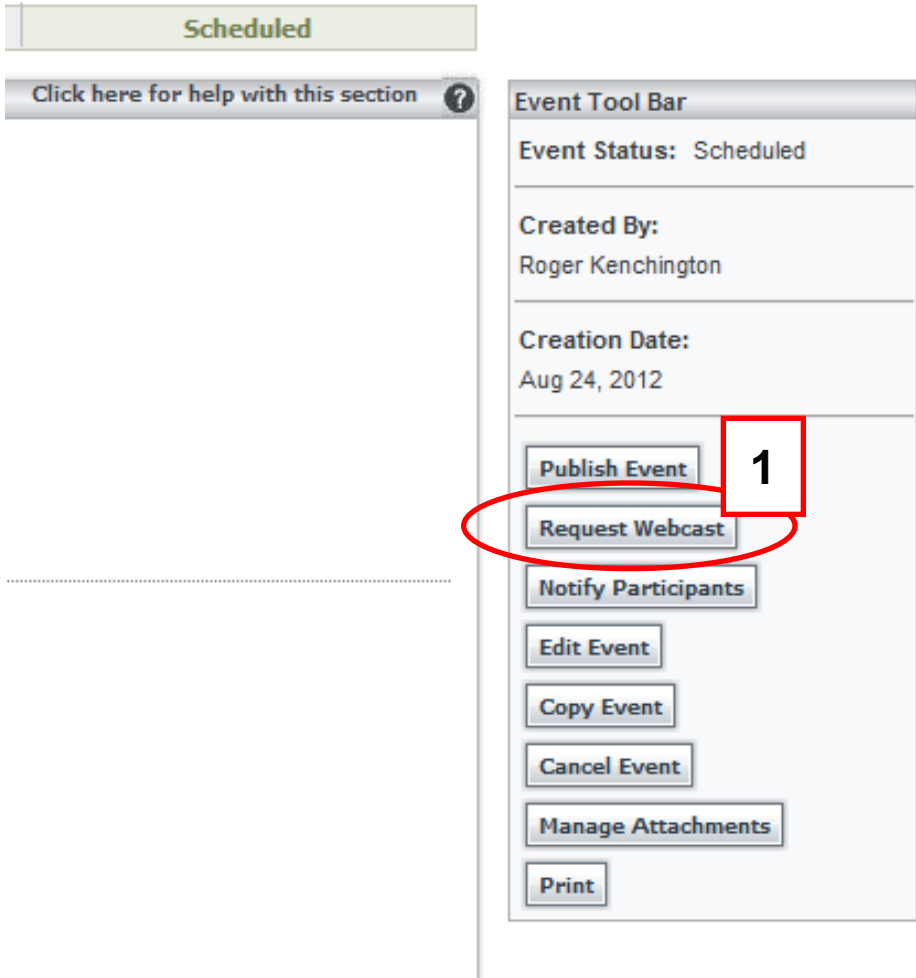


You might want to consider utilizing webcasting if you need to extend the reach of your event beyond rooms equipped with videoconferencing equipment. Furthermore, a webcast is ideal if you need to present the same information multiple times to different people.



If you choose to webcast an event, please ensure that you request it at least one business day before the scheduled event. Furthermore, the scheduled event requires a minimum of 15 minutes set – up time.

## Webcast Your Event



The screenshot shows the 'Event Tool Bar' interface. At the top, there is a 'Scheduled' tab and a help link 'Click here for help with this section'. The main area displays event details: 'Event Status: Scheduled', 'Created By: Roger Kenchington', and 'Creation Date: Aug 24, 2012'. Below these details is a vertical stack of buttons: 'Publish Event', 'Request Webcast', 'Notify Participants', 'Edit Event', 'Copy Event', 'Cancel Event', 'Manage Attachments', and 'Print'. The 'Request Webcast' button is highlighted with a red circle, and a red box with the number '1' is placed to its right.

[1] After scheduling your non-clinical multipoint events, you will now notice an option in the menu to request a webcast. Once selected you will see a “Webcast Request Form Details” page which will auto-populate with event information, including date, time, event title and presenter name or names.

**Webcasts are for purely educational purposes. Do not webcast an event that includes patients or discloses patient information.**

## Webcast Your Event

The screenshot shows the Ncompass webcast setup interface with four main sections:

- Event Details:** Contains fields for Date (Oct 31, 2012 - 10:00 to 11:00), Event Title (Hay Fever Seminar), Host Site (TOR\_OTN\_0099\_TRNG\_01), and Event Type (Other).
- Webcast Request Form Details:** Features a "Webcast Event Time" section with a green bar and a right-pointing arrow. Below it are input fields for Start Time\* (1000) and End Time\* (1100), with the format "24 Hour Format, HHMM". A red circle highlights this section, and a red box with the number "2" is placed over the arrow.
- Presenter Information:** Includes fields for Event Requestor (Roger Kenchington), Email (rkenchington@otn.ca), and Phone Number (4164464110x4192). A red circle highlights the "Add Presenter" button, and a red box with the number "3" is placed over it.
- Additional Webcast Details:** Contains radio buttons for "Type Of Webcast" (Live Only, Live and Archived, Archived Only), a "Will you also have a slide presentation?" field (Yes/No), and a "Password Protection Required" field (Yes/No).

[2] On this page you will be able to complete the Webcast Request details. If required - you may choose a different time for the webcast to start or end, as long as it falls within the event time.

[3] You have the ability to add multiple presenters to your event. Each time you click on "Add Presenter" a new field will appear for you to type in the name and email address of the presenter.

## Webcast Your Event

**Additional Webcast Details** [Click here for help with this section](#)

Type Of Webcast:  Live Only  Live and Archived  Archived Only

Will you also have a slide presentation?:  Yes  No

Password Protection Required:  Yes  No

Create a new Username?:  Yes  No

Username:

Password:

Please specify the username and password to be used. Both must be one word and between 2-30 alpha and/or numeric characters.

4

[4] In the Additional Webcast Details section, you'll have the options to choose whether you want the webcast live, archived or a combination of both. You'll also be able to choose whether you want the webcast public or private. Private webcasts require that the viewer type in a password and are ideal for staff training or internal educational events.

**Ask A Question Feature** [Click here for help with this section](#)

Enable "Ask A Question" Feature?:  Yes  No

Email:

Validate Email:

Input the Email Address of the Individual(s) who will be receiving questions during the Live Webcast.

Comments (Less than 1000 Characters):

**Webcast Tool Bar**

Webcast Status: New

Created By: Andrew Morgan

Created Date: May 28, 2010

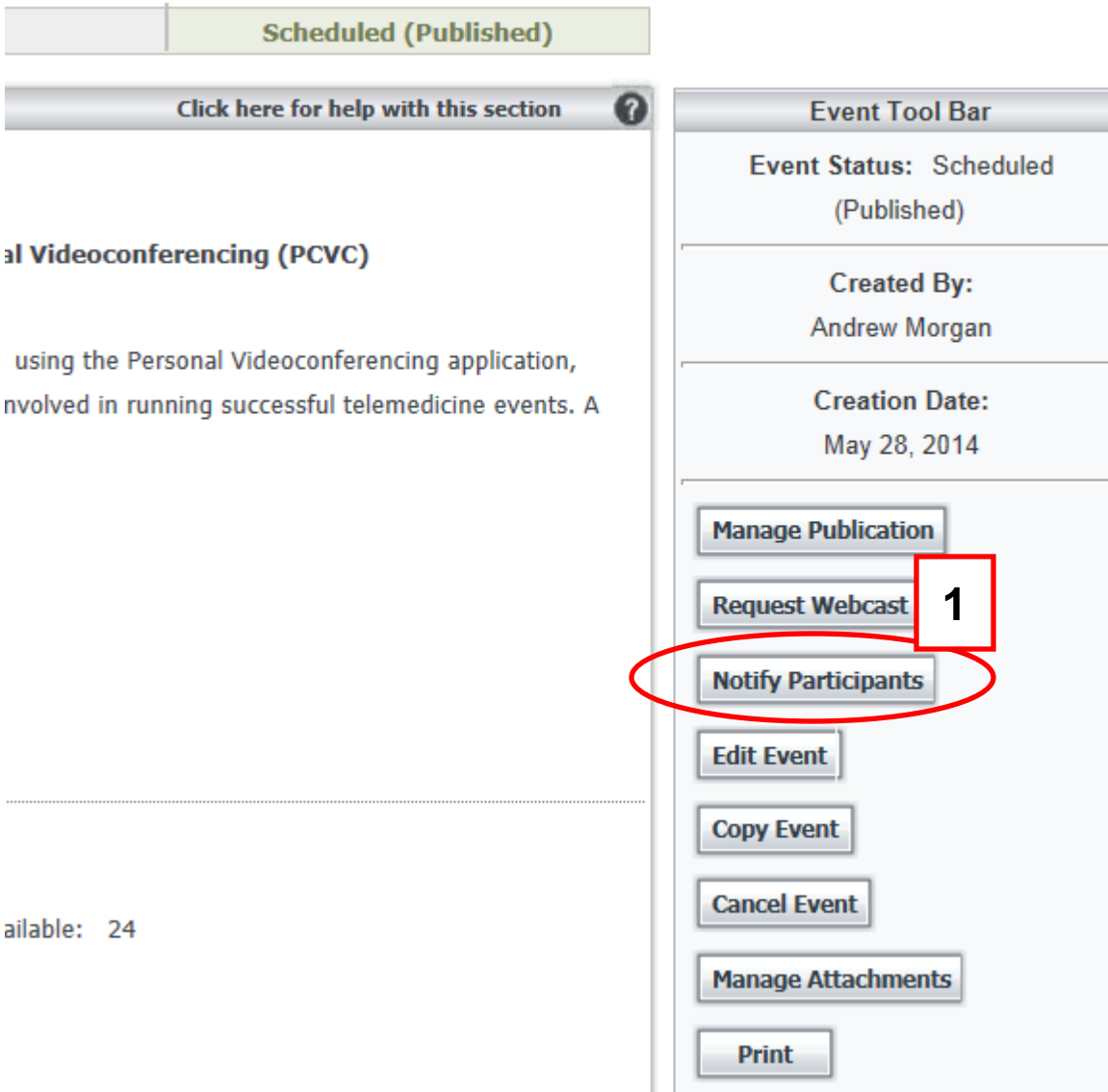
5

[5] When you have entered all necessary information, please click on "Submit Request". You will receive a real-time system response. All archived webcasts require that the presenters complete a webcast agreement form.

### **Webcast Considerations:**

- ✓ **If you choose to webcast the event, please ensure that you request it at least one business day before the scheduled event. A webcast event must occur during standard business hours from 7:00 AM – 7:00 PM Monday to Friday.**
- ✓ **Presenters participating in archived webcasts will also receive an email which will include a hyperlink to the Webcast Agreement Form. From this online form, they can provide their consent to have the webcast archived.**

## Notify Participants



Scheduled (Published)

Click here for help with this section ?

al Videoconferencing (PCVC)

using the Personal Videoconferencing application,  
involved in running successful telemedicine events. A

Event Tool Bar

Event Status: Scheduled  
(Published)

Created By:  
Andrew Morgan

Creation Date:  
May 28, 2014

Manage Publication

Request Webcast **1**

**Notify Participants**

Edit Event

Copy Event

Cancel Event

Manage Attachments

Print

available: 24

The Notify Participants button is useful when corresponding with participants enrolled in an event.

**[1]** When the Notify Participants button is clicked, MS Outlook or any other type of Email based application will be launched.



## Notify Participants

Send	To...	
	Cc...	
	Bcc...	<a href="#">Kellam, Hugh</a> ; <a href="#">Morgan, Andrew</a>
	Subject:	Ncompass event notification for event #36056118

\*\*\*\*\* Event notification [36056118] \*\*\*\*\*

DATE: Sep 04, 2014, 12:00 to 12:45

EVENT TITLE: OTN Best Practices Lunch Learn - Personal Videoconferencing (PCVC)

SHORT DESCRIPTION: The session will cover the practical aspects of scheduling a consultation, using the Personal Videoconferencing application, demonstrating successful telemedicine events. A PDF guide with handy checklists will also be included with the training.

NOTES FOR ALL PARTICIPANTS:

PRESENTERS: Roger Kenchington

REQUESTOR: Andrew Morgan

Phone: 4164464110x4288

Fax:

Email: amorgan@otn.ca

URL: <https://schedule.otn.ca/tsm/portal/nonclinical/details.do?request.requestId=36056118>

HOST SYSTEM: Ontario Telemedicine Network (OTN) - Toronto, TOR\_OTN\_0099\_TRNG\_01

PARTICIPANT SYSTEM NAME(S):

	ARRIVAL AT	DEPARTURE AT
Ontario Telemedicine Network (OTN) - Toronto, TOR_OTN_0099_OTN_18	12:00	12:45

\*\* NOTE \*\*

If your system is arriving late, you must contact the OTN Service Desk at the time you wish to join the event and provide the Service Desk with the Event ID

If your system is departing early, please disconnect from the event at the desired time. If you do not possess the ability to disconnect from events, contact

The “subject” line contains the event number. The Bcc field include email addresses pulled from Contact Email field under each of the Participating Systems registered. The body of the email includes pertinent details regarding the event. Nearer the bottom of the email is a URL link that Ncompass Users can use to locate the event.



## Edit an Event

Scheduled (Published)

Click here for help with this section ?

Personal Videoconferencing (PCVC)

using the Personal Videoconferencing application, involved in running successful telemedicine events. A

Event Tool Bar

Event Status: Scheduled (Published)

Created By: Andrew Morgan

Creation Date: May 28, 2014

Manage Publication

Request Webcast

Notify Participants

**1**

Edit Event

Copy Event

Cancel Event

Manage Attachments

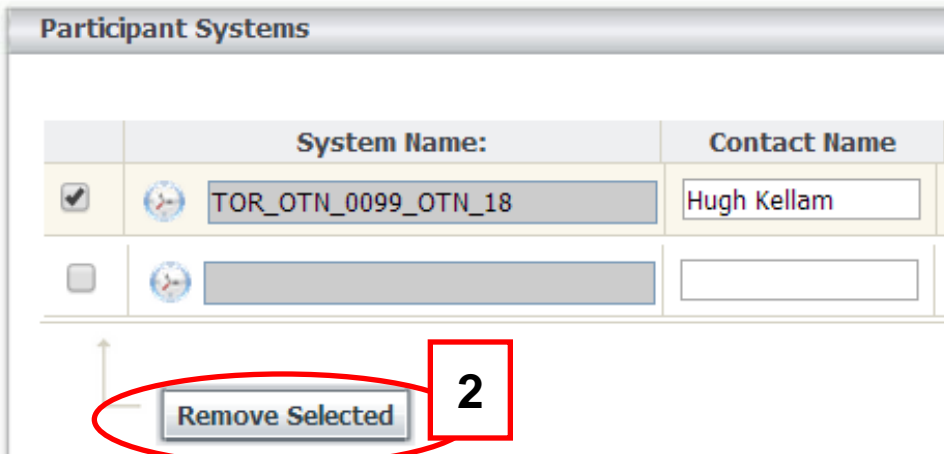
Print

Available: 24

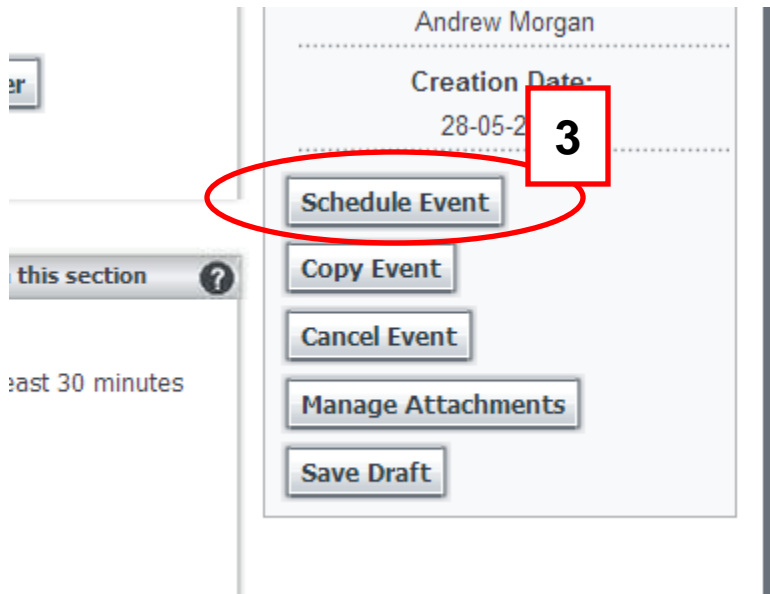
The edit feature can be used if you need to make changes to the event; such as switching or removing a system. If you need to change the date or time of an event, it is advisable to cancel and then reschedule the event. This ensures that all the participating sites are aware of the changes made.

**[1]** When the Edit Event button is clicked, the event changes from a Scheduled to an Unscheduled status.

## Edit an Event

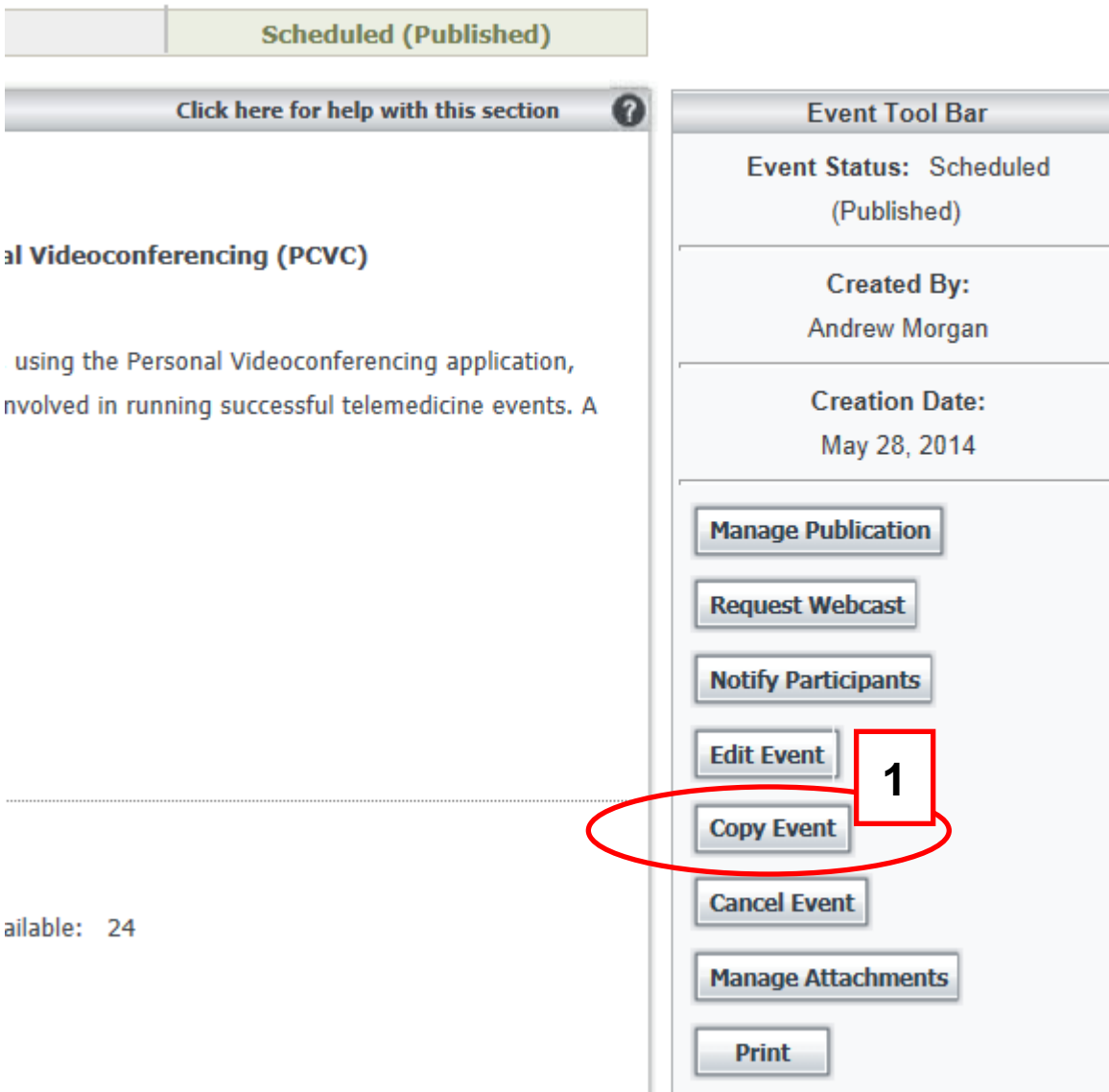


**[2]** In this case, let's remove a system from the event. You should communicate the change to the participating sites involved by using the notification feature previously described.



**[3]** To finalize your changes click on the Schedule Event button. Please note, that if you do not click the Schedule Event button

## Copy an Event



The screenshot shows the 'Event Tool Bar' for a 'Scheduled (Published)' event. The toolbar contains the following buttons: Manage Publication, Request Webcast, Notify Participants, Edit Event, Copy Event, Cancel Event, Manage Attachments, and Print. The 'Copy Event' button is circled in red, and a red box with the number '1' is placed next to it. A red arrow points from the 'Copy Event' button to the text on the right side of the slide.

Scheduled (Published)

Click here for help with this section ?

al Videoconferencing (PCVC)

using the Personal Videoconferencing application,  
involved in running successful telemedicine events. A

Event Tool Bar

Event Status: Scheduled  
(Published)

Created By:  
Andrew Morgan

Creation Date:  
May 28, 2014

Manage Publication

Request Webcast

Notify Participants

Edit Event

Copy Event

Cancel Event

Manage Attachments

Print

Copying an event duplicates its details into a brand new event with a status of unscheduled. This can save you a great deal of time if you need to schedule a new event that involves the same event details.

**[1]** When the Copy Event button is clicked a new event number is now generated.

## Copy an Event

[Click here for help with this section](#) ?

**Date and Time**

**Date of Event:**  
 You cannot schedule multipoint events to occur on business days during business hours. Multipoint events must be created at least 30 minutes before they are scheduled to occur.

**Closing Registration Date:**  
 Participant registration must end at least 30 minutes prior to an event's scheduled occurrence.

**Event Start and End Times:**

Setup Starts	Event Setup:	Scheduled Event:	
12:00	<input type="text" value="0"/> Setup (Minutes)	<input type="text" value="1200"/> Start Time*	<input type="text" value="1245"/> End Time*
			24 Hour Format, HHMM

**NOTE:** Set up time is reserved for pre-event preparations such as connection systems and roll-call.

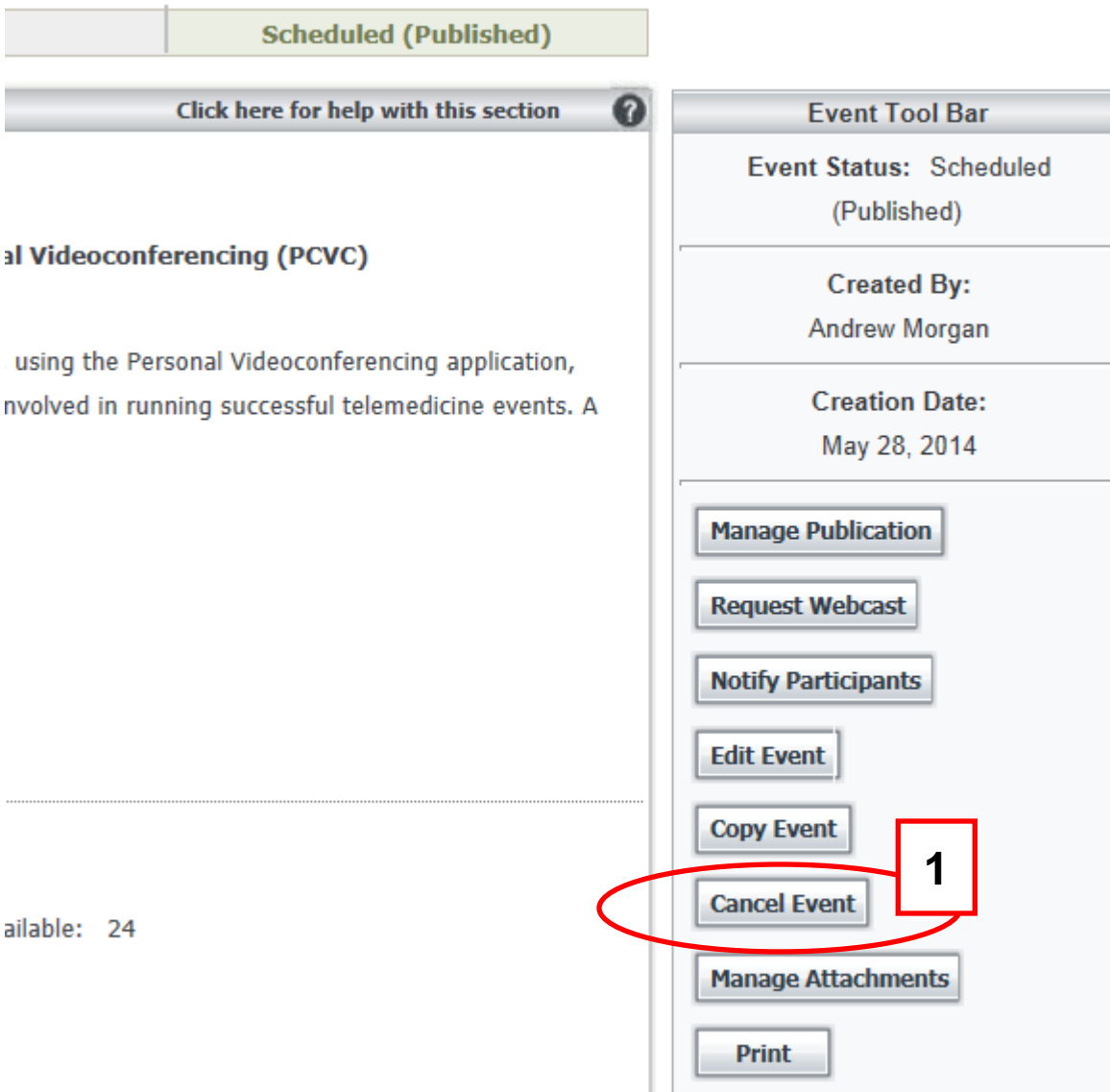
2

**[2]** The event will now have conflicts that are indicated by the red text below each of the system names. In order to schedule the event please specify a new event date or time.

**3**

**[3]** Click the schedule button and confirm the status of the event. The clone information has been inserted into the notes field.

## Cancel an Event



The screenshot shows the 'Event Tool Bar' for a 'Scheduled (Published)' event. The toolbar contains the following buttons: Manage Publication, Request Webcast, Notify Participants, Edit Event, Copy Event, Cancel Event, Manage Attachments, and Print. The 'Cancel Event' button is circled in red, and a red box with the number '1' is placed next to it.

Remember that it's important to cancel events to avoid security breaches.

**[1]** To Cancel an Event click on the Cancel Event button in the Event Tool Bar.

## Cancel an Event

CANCEL NON-CLINICAL EVENT #36056118

New	Unscheduled	Scheduled
-----	-------------	-----------

**Reservation Details** [Click here for help with this section](#) ?

Date: Sep 04, 2014  
 Event Time: 12:00 to 12:45  
 Event Title: **OTN Best Practices Lunch Learn - Personal Videoconferencing (PCVC)**

**Cancellation Details** [Click here for help with this section](#) ?

Reason \*:

Log:

**Event Tool Bar**

Status: Scheduled

Created By: [redacted] w Morgan

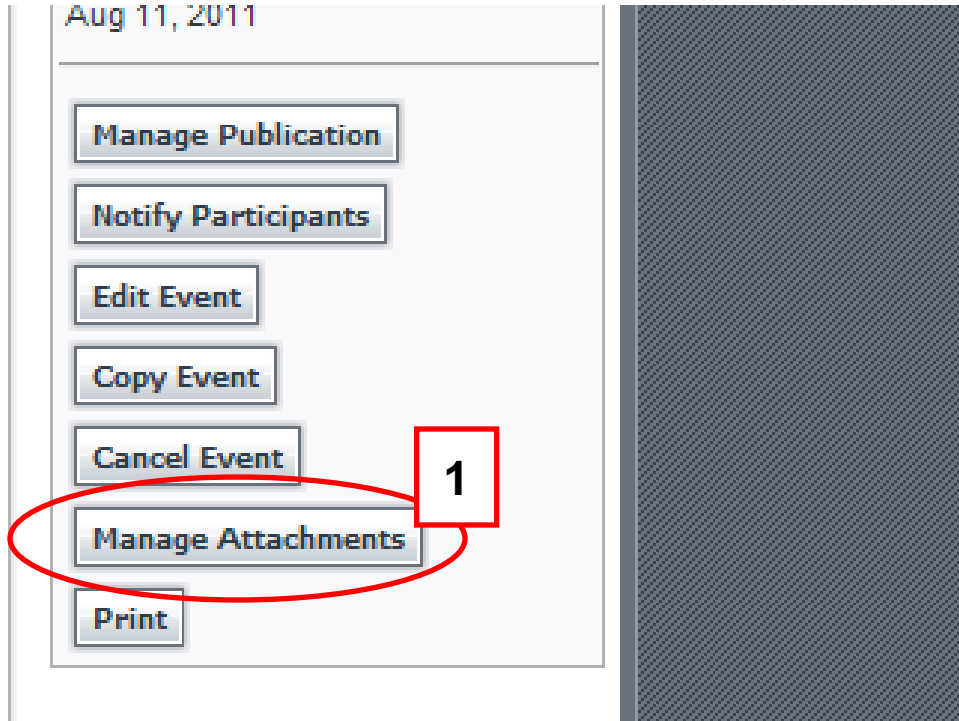
Creation Date: [redacted] y 28, 2014

**3**

**[2]** This brings up a window where you can select the reason why you are cancelling the event. Find the most suitable reason from the dropdown menu. You also have the option to write any additional comments in the log field.

**[3]** Now click on the “Save Changes” button and confirm that the status has been changed to a cancelled.

## Attaching Documents



**[1]** The Manage Attachments button allows you to add any attachments to your event in Ncompass. If you choose to have your event published in the Learning Centre, then the attachments will also be accessible there.

## Attaching Documents

Edit Registration Details #14566563

New	Unscheduled	Scheduled (Published)
-----	-------------	-----------------------

Reservation Details [Click here for help with this section](#)

Date: Aug 31, 2011  
Event Time: 10:00 to 11:00  
Event Title: **Hay Fever**

Supporting Materials [Click here for help with this section](#)

**2**  0 File(s) selected **3** of 50 MB used.

File C:\Users\rkenchington\ [  Description

**[2]** To add an attachment, please press the Add File button. You will now be able to browse and select the file you would like to attach to the event. Please note, you can attach as many documents as required, however, 50 MB is the maximum capacity.

**[3]** In the Description field you will be able to provide a short title of the file being attached.



## Attaching Documents

Edit Registration Details #14566563
Registration Open

New
Unscheduled
Scheduled (Published)

**Reservation Details** Click here for help with this section ?

Date: Aug 31, 2011  
 Event Time: 10:00 to 11:00  
 Event Title: **Hay Fever**

**Supporting Materials** Click here for help with this section ?

Add File
1 File(s) selected, 12.8 KB of 50 MB used.

Remove	File Name	Description	Date Added
<input type="checkbox"/>	Hayfever_Agenda.docx	Hay Fever Agenda	Aug 26, 2011

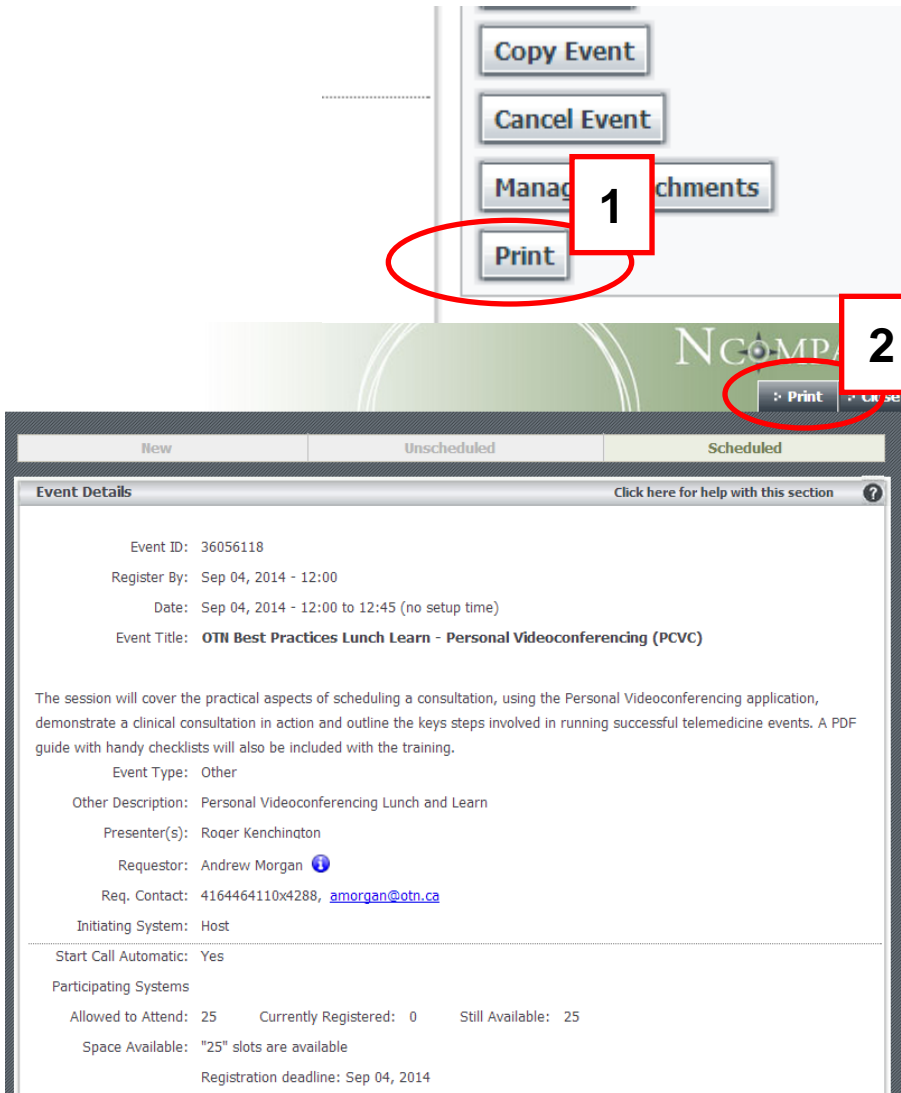
**Event Tool Bar**

Status: Scheduled (Published)  
 Created By: Larry Learner  
 Creation Date: A 9 011

Save Changes  
Return To Event

**[9]** Press the Save Changes button to ensure that your attachments are now linked to the event. You will also notice that you have the option to remove attachments if necessary. Please note that you will not be able to add the same file more than once and files can be added or removed at any time.

## Print Event Details



[1] As a Telemedicine Coordinator, it's good practice to provide participants with a hardcopy of the event details. When you click the Print button, the event details will be formatted to print.

[1] Click the Print button again at the top right of the screen.

### Ncompass Terminology

Auto Initiate	An Ncompass feature that enables events to start and end automatically without manual intervention. This means that if you schedule an event to start at 8:00 AM, the systems involved will automatically connect at that time, providing the videoconferencing systems have been turned on
Clinical Event	An event that directly or indirectly discloses patient information.
Event Access	A field in Ncompass that determines whether participants can register/deregister their own systems for the event.
Multipoint	An event that involves more than three sites in a videoconference. Any multipoint event requires a bridge. A bridge acts like the hub of a wheel, bringing together the spokes or in this case the individual sites in a videoconference. All multipoint events have a clearly defined start and end time and must be scheduled at least 30 minutes before they are to occur.

# Ncompass Terminology

Ncompass	Ncompass is an online scheduling tool designed for OTN Members to schedule and manage videoconferencing events. It's simple to use, secure and gives OTN Members access to the same scheduling information as OTN's Scheduling Services.
Point-to-point	An event that takes place between two videoconference systems and does not require the involvement of a bridge. Consequently, point-to-point calls can be scheduled at any time. In addition, point-to-point events provide users with portal calling features.
Private Event	The host registers the sites that will attend the event. It is also the host's responsibility to contact all the participants that are registered.
Public Event	The event is published in Ncompass and participants can register their own system to the event.