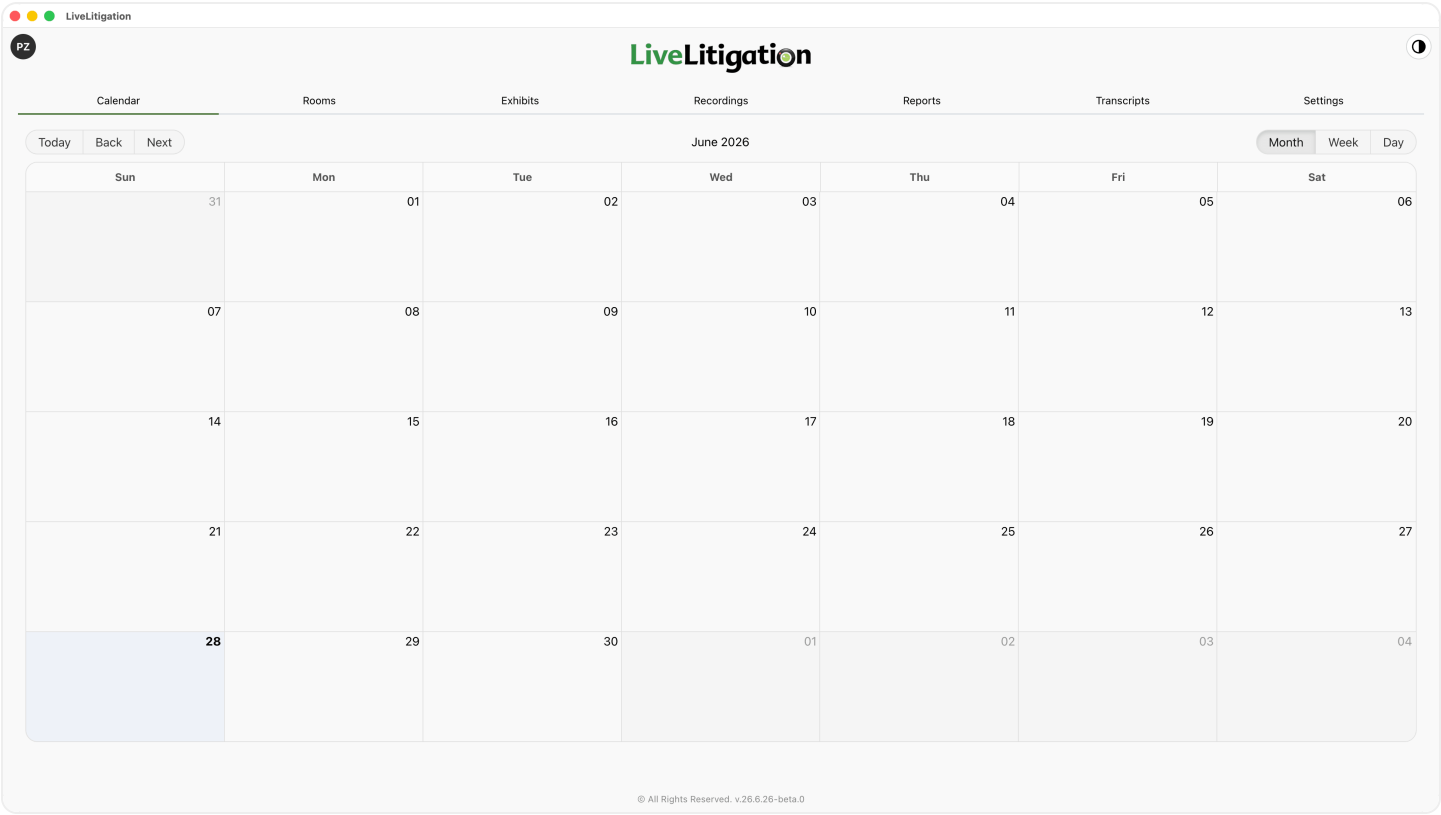


How to Create an eSuite Room

Step-by-step instructions for scheduling and configuring a new room in eSuite.

1. Login and Calendar View

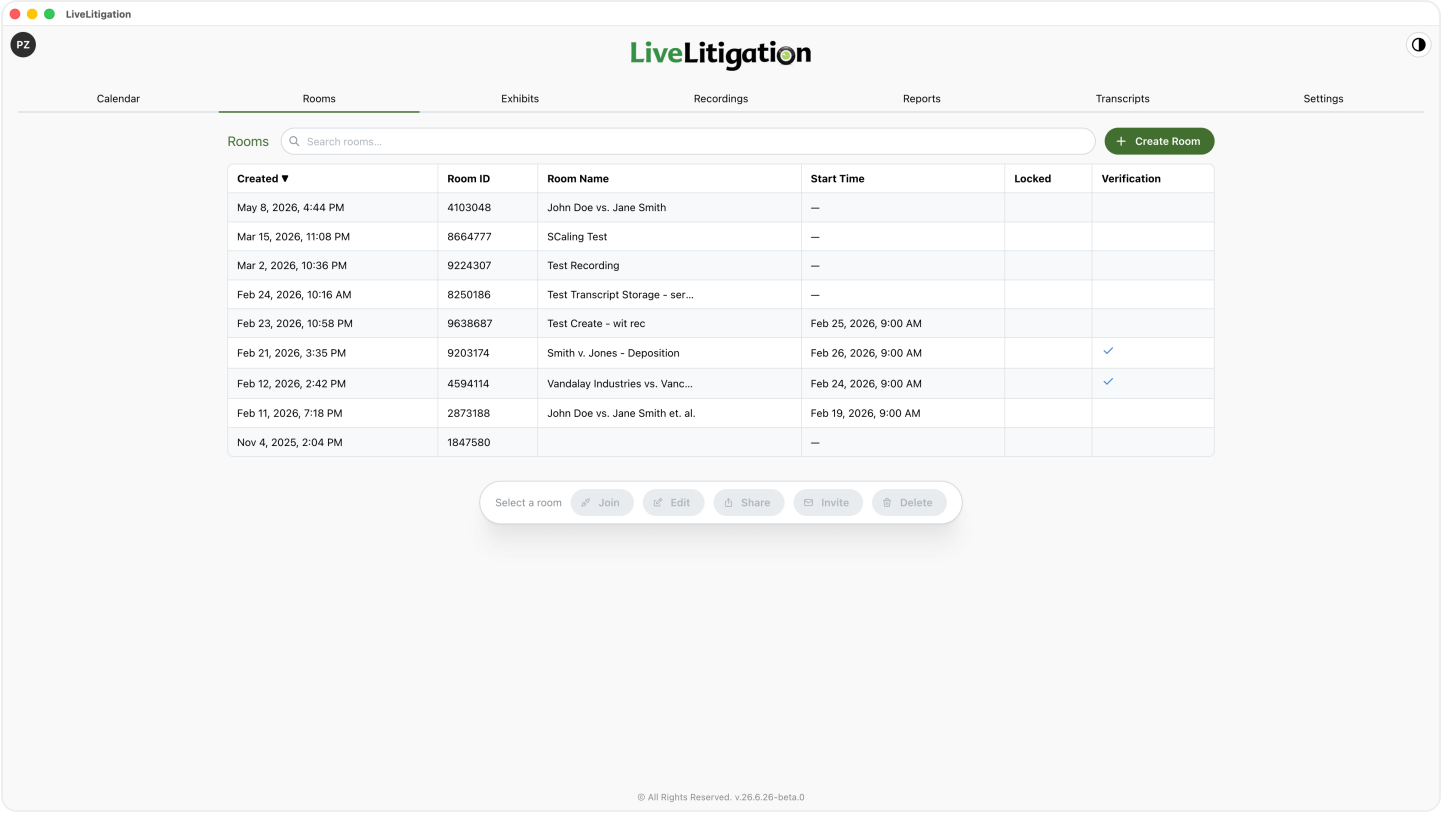
Login to your account with your email address. You will see your eSuite event calendar upon logging in. Use the top navigation to move between the **Calendar**, **Rooms**, **Exhibits**, **Recordings**, **Reports**, **Transcripts**, and **Settings**. Toggle the calendar between **Month**, **Week**, and **Day** views.



2. Schedule a Room

You can double click an event date on the calendar to schedule a room for that day, or open the **Rooms** tab and click **Create Room**.

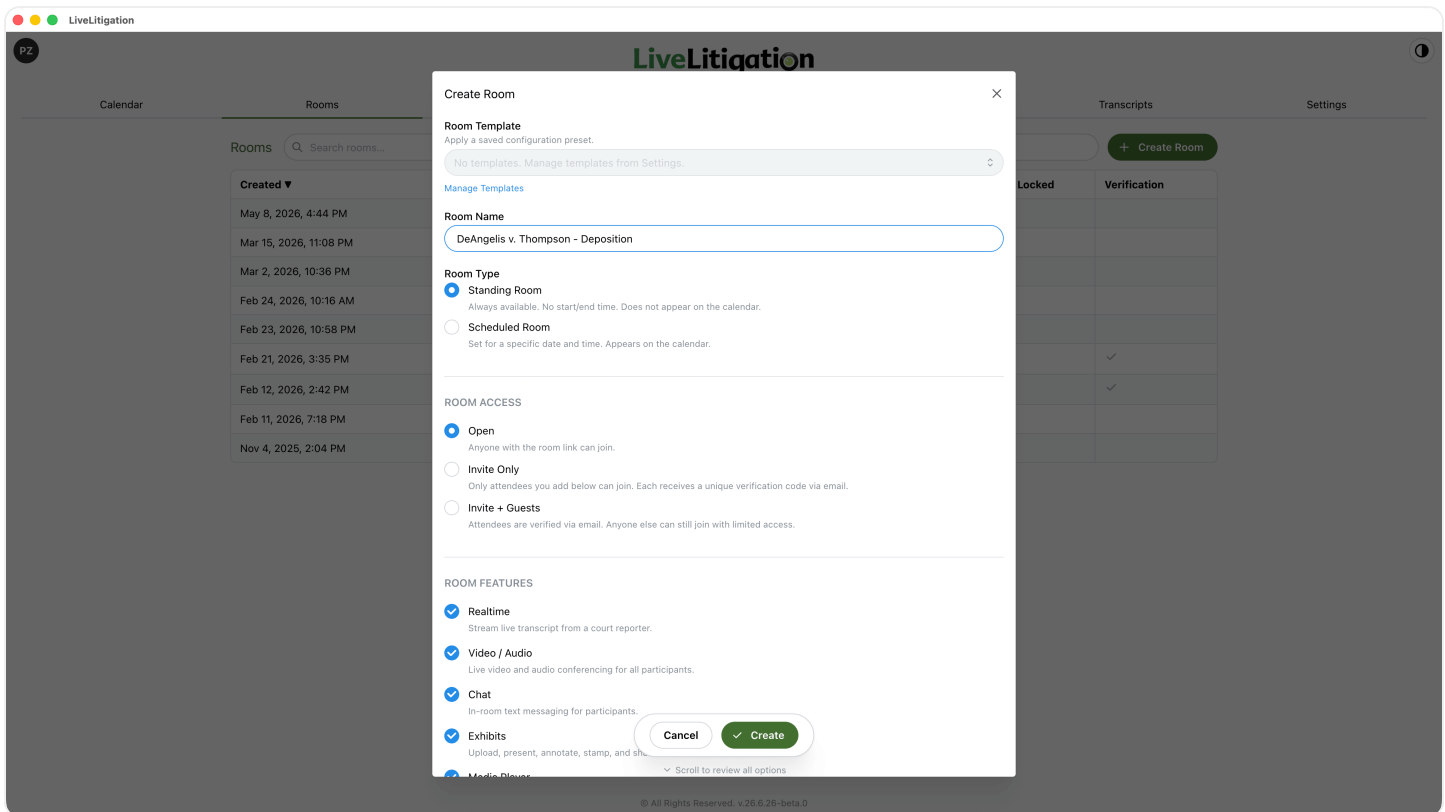
The Rooms list shows each room's Room ID, start time, lock state, and verification status. Selecting an existing room reveals actions to **Join**, **Edit**, **Share**, **Invite**, or **Delete** it.



3. Room Name

Enter a name for the room such as the Case Name or other identifier.

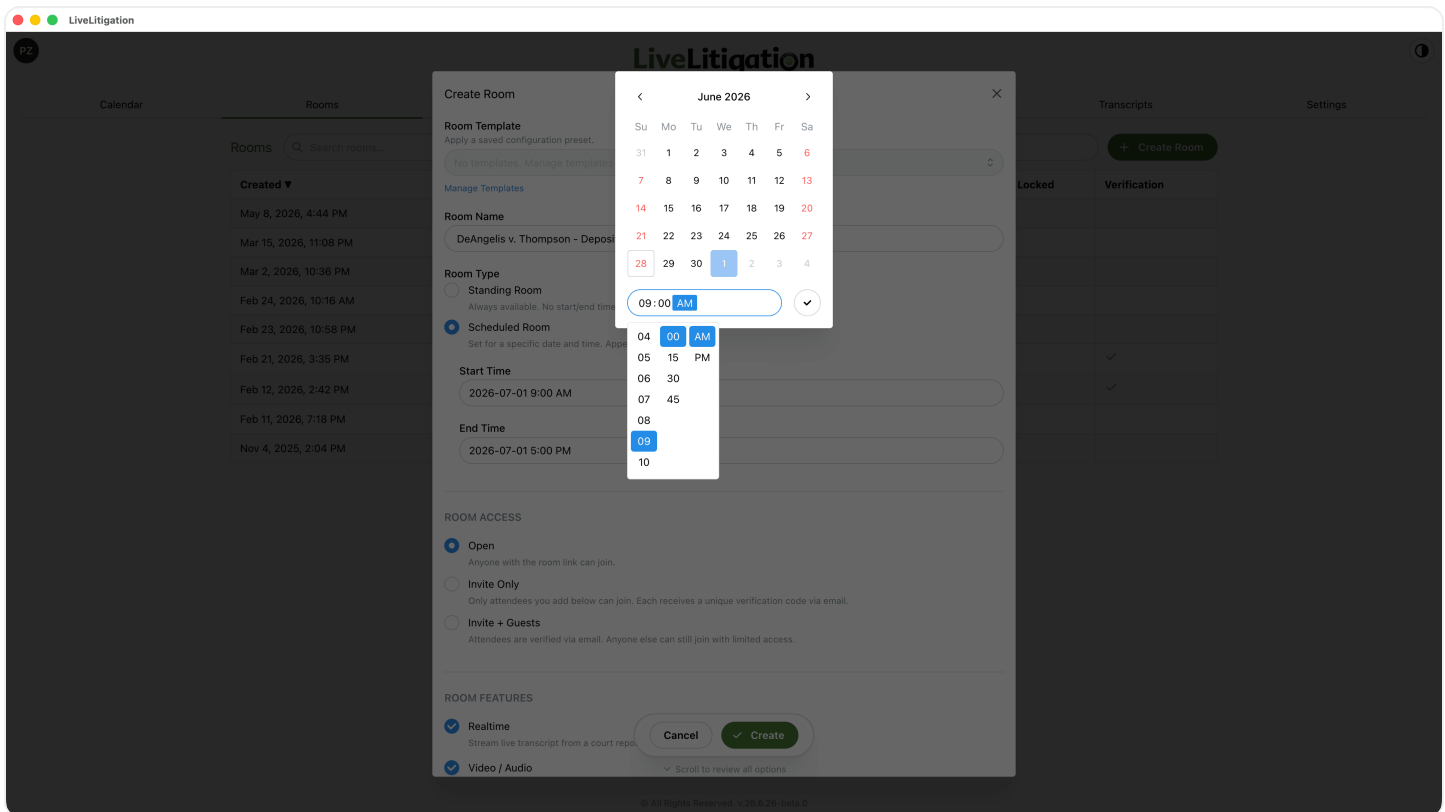
Optionally apply a saved **Room Template** to pre-fill the room’s configuration. Templates are created and managed from **Settings**.



4. Date and Time

Choose a **Room Type**:

- **Standing Room** - Always available, with no start or end time. Does not appear on the calendar.
- **Scheduled Room** - Set for a specific date and time. Appears on the calendar.
- For a **Scheduled Room**, select a start date and time.
- Select an approximate end date and time to inform attendees' calendars. End time will not affect access to the room.

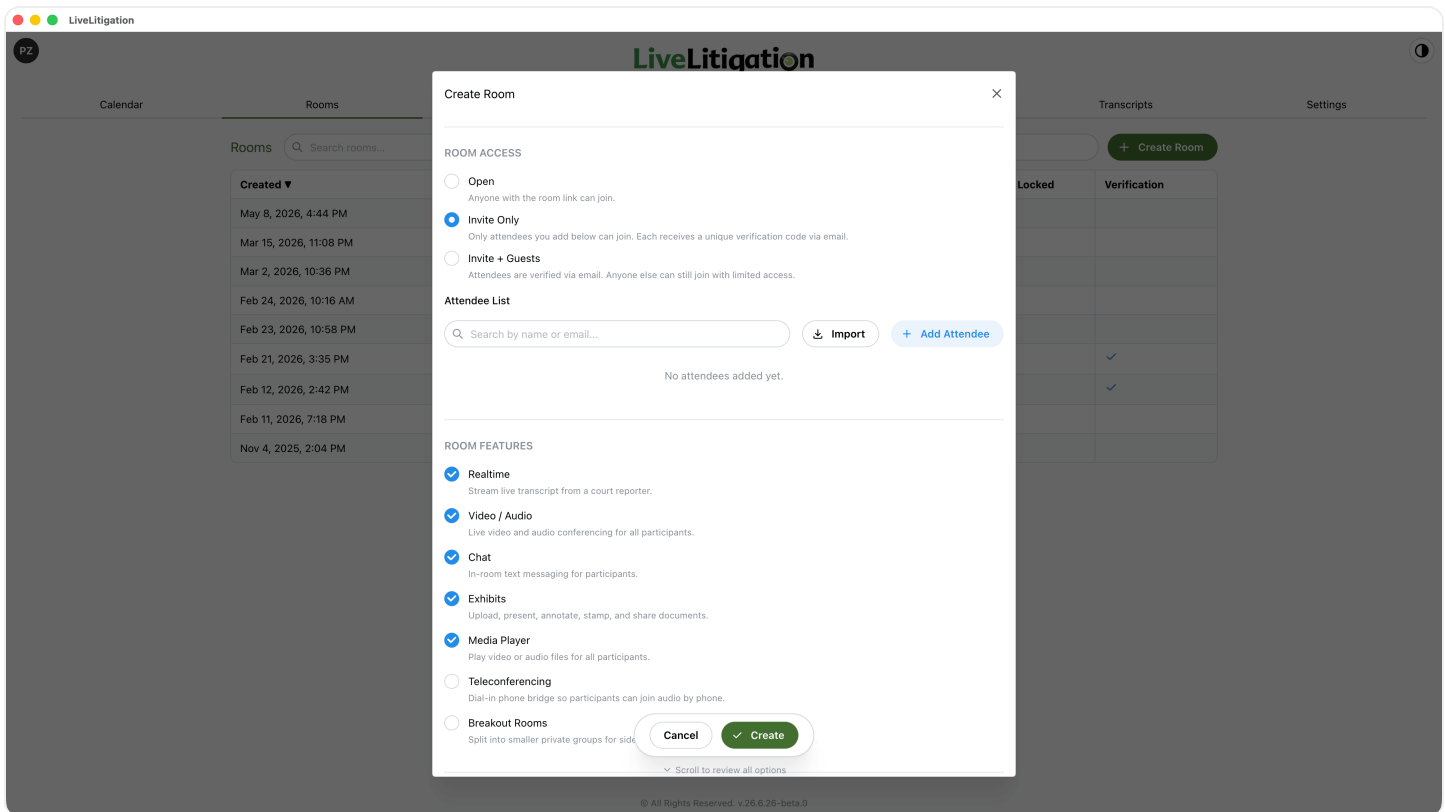


5. Room Access

Choose who is allowed to join under **Room Access**:

- **Open** - Anyone with the room link can join.
- **Invite Only** - Only attendees you add below can join. Each receives a unique verification code via email.
- **Invite + Guests** - Added attendees are verified via email, and anyone else can still join with limited guest access.

Selecting **Invite Only** or **Invite + Guests** reveals the **Attendee List**, where you can add participants individually, search the list, or **Import** attendees in bulk.



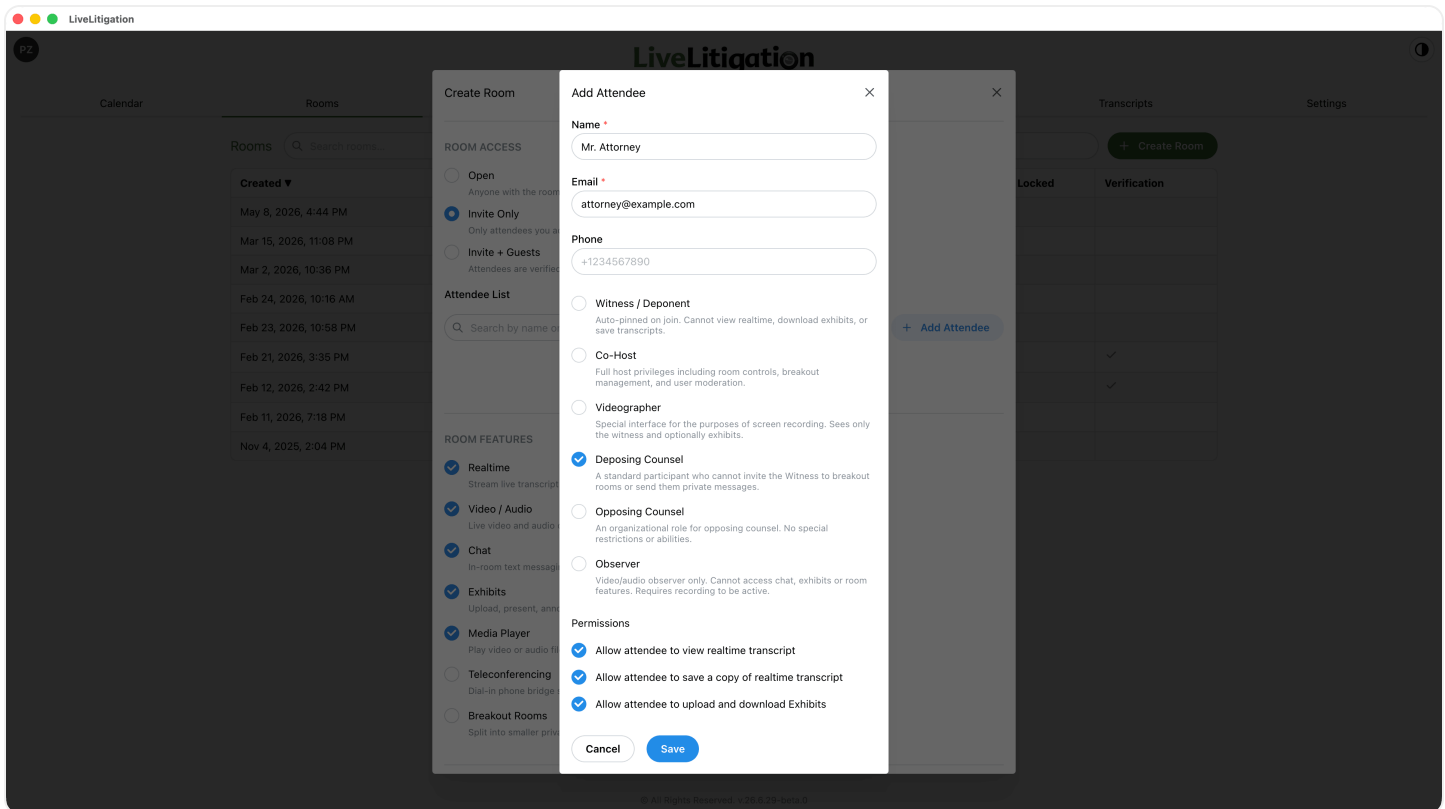
6. Add Attendees

Click **Add Attendee** and enter each person's information. **Name** and **Email** are required; **Phone** is optional.

Assign a **Role** that fits their part in the proceeding:

- **Co-Host** - Full host privileges, including room controls, breakout management, and user moderation.
- **Deposing Counsel** - A standard participant who cannot invite the Witness to breakout rooms or send them private messages.
- **Opposing Counsel** - An organizational role for opposing counsel, with no special restrictions or abilities.
- **Videographer** - A special interface for the purposes of screen recording. Sees only the witness and, optionally, exhibits.
- **Observer** - Video/audio observer only. Cannot access chat, exhibits, or room features. Requires recording to be active.
- **Witness / Deponent** - Covered in the next step.

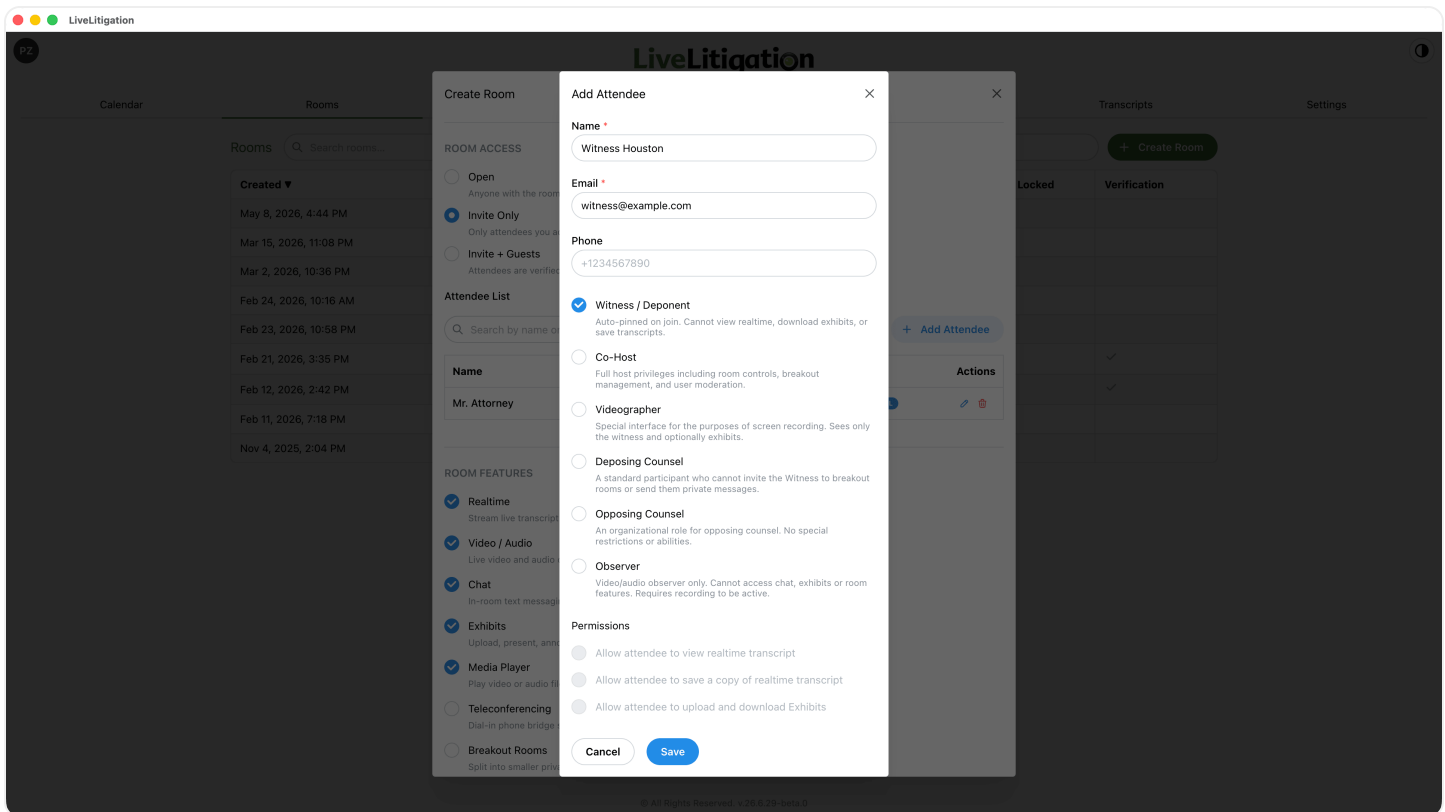
Then set the attendee's **Permissions** accordingly: view the realtime transcript, save a copy of the realtime transcript, and upload and download Exhibits.



7. Add Witness

Add the Witness by entering their information and selecting the **Witness / Deponent** role.

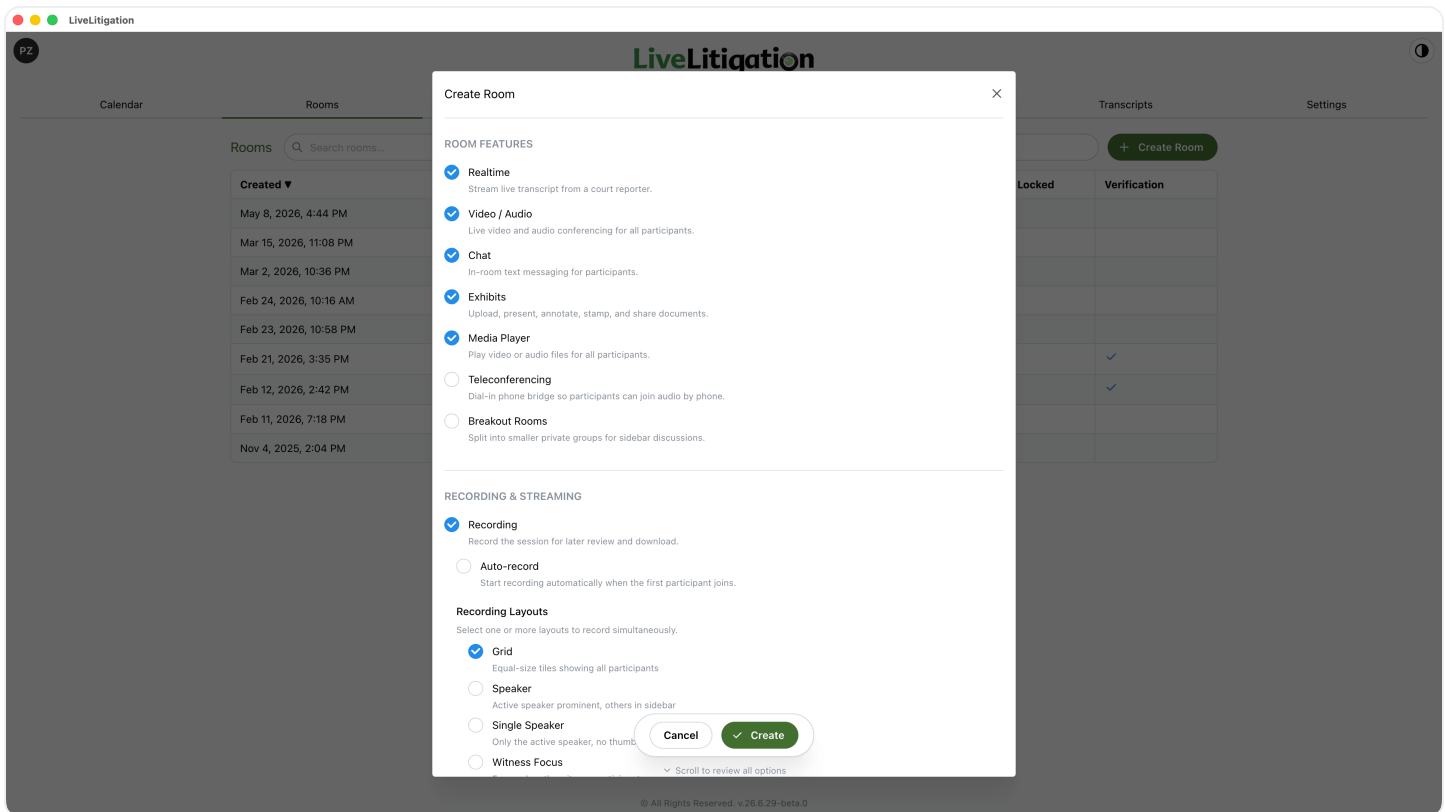
This designates the attendee as the Witness and crafts a unique room experience for everyone that is built around the Witness. The Witness is auto-pinned on join, and by default cannot view the realtime transcript, download exhibits, or save transcripts. These permissions are set automatically for this role.



8. Room Features

Select any features you intend to use during this event:

- **Realtime** - Stream the live transcript from a connected court reporter.
- **Video / Audio** - Live video and audio conferencing for all participants.
- **Chat** - In-room text messaging for participants.
- **Exhibits** - Upload, present, annotate, stamp, and share documents.
- **Media Player** - Play video or audio files for all participants.
- **Teleconferencing** - Dial-in phone bridge so participants can join audio by phone.
- **Breakout Rooms** - Split into smaller private groups for sidebar discussions.



9. Room Recording

Under **Recording & Streaming**, enable **Recording** to capture the session for later review and download.

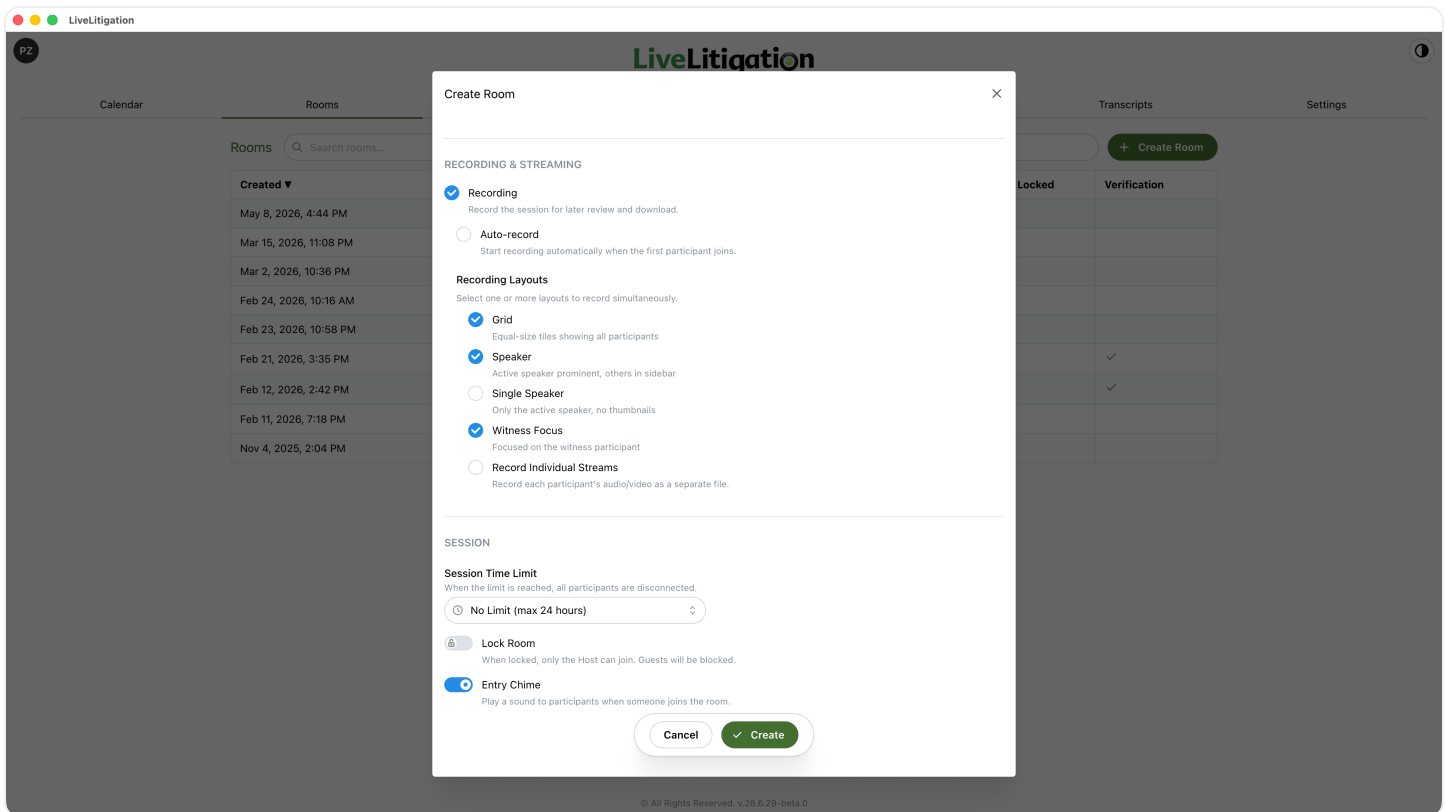
- **Auto-record** - Start recording automatically when the first participant joins.

Under **Recording Layouts**, select one or more layouts to record simultaneously:

- **Grid** - Equal-size tiles showing all participants.
- **Speaker** - Active speaker prominent, others in a sidebar.
- **Single Speaker** - Only the active speaker, no thumbnails.
- **Witness Focus** - Focused on the witness participant.
- **Record Individual Streams** - Record each participant's audio/video as a separate file.

At the bottom of the form, the **Session** options let you set a **Session Time Limit** (all participants are disconnected when it is reached), **Lock Room** (only the Host can join; guests are blocked), and **Entry Chime** (play a sound when someone joins the room).

When you have finished configuring the room, click **Create**. You can always edit the room later and adjust any of these options.



10. Send Invitations

To send a Calendar/Email invitation, select the room and click **Invite**.

The invitation is automatically addressed to all verified attendees, and can be sent to additional email addresses if desired. Note that unauthorized parties (not on the list) will be unable to join unless **Invite + Guests** was selected for the room.

- Choose an **Invitation Type**: a **Calendar Event** (with fallback email), or **Email Only**.
- Calendar invitations will go directly onto the attendee's calendar. If rescheduled, you can re-send to update.
- The **Time Zone** reflects how the event's start time is displayed in email. Calendar invitations always reflect local time.
- Add a custom **Note** to be included with the invite.
- Enable **Also Send SMS** to text the invitation to one or more phone numbers.

Invitation History tracks each recipient, how they were contacted, status, number of sends, and when they were last sent.

Invitation Type

☒ Calendar Event ☐ Email Only

Select verified attendees to invite

Mr. Attorney (attorney@ex

Mr. Attorney (attorney@example.com) X Witness Houston (witness@example.com) X

Select attendees

Enter additional email addresses to invite. Press Enter to add.

 To:

 To:

The time in the invitation will be displayed in this time zone.

Eastern Time (ET) - America/New_York

Eastern Time (ET) - America/New_York

Add a message to include in the invitation email...

 Also Send SMS

Enter phone numbers with country code (e.g. +18185551234). Press Enter to add.

+1...

Cancel

[Send Invitations](#)

Recipient	Via	Status	# Sends	Last Sent
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Mr. Attorney attorney@example.com	EMAIL	Not Sent	0	-
Witness Houston witness@example.com	EMAIL	Not Sent	0	-