activeevents
CONFERENCE™

Conference 6.1
Content Management Quick Reference

This quick start guide outlines the basic workflow for key Content management tasks in the ActiveEvents Conference system.

To complete these tasks, log in to the Conference Administrator as a user with the specified security role. When following these instructions, start a task from the menu bar at the top of the interface. When steps refer to "the left navigation bar," choose an option in the list of links on the left of the page.

For detailed instructions, see the Conference documents and online help at http://www.wingateweb.com/support.

This document includes these sections:

1: Managing Session Records

NOTE
To complete Management tasks, you must have a System Administrator or Content Administrator security role on your user account.

Session Details

1. Create or import session records

   Content > **Add New Session**
   OR
   Content > **Import Sessions**

   (If you have set up Call for Papers, sessions may also be added through that site. If you plan to use Voting, see Voting on Sessions on page 1.)

2. Search for existing session records.

   Content > **Session Search**

3. Add details to session records.

   In the session record, choose these options on the left navigation bar:

   Session Details
   Session Profile
   AV Requirements

4. Add speakers and other participants.

   In the session record, choose **Participants** on the left navigation bar.

   (If you use Call for Papers, approve Proposed Speakers.)

5. If necessary, complete content tasks on behalf of speakers or other participants.

   In the session record, choose **Content Tasks** on the left navigation bar.

6. If necessary, manage presentation files for the session.

   In the session record, choose **Presentation Management** on the left navigation bar.

7. Approve sessions.

   In the session record, choose **Session Details** on the left navigation bar, and choose **Approve** as the **Status**.

8. Lock and publish the session to the Session Catalog.

   In the session record, choose **Session Details** on the left navigation bar, and click the **Lock** and **Publish** options.

Advanced Tasks

1. Create a worklist to edit records in bulk.

   Content > **Session Search**, and add records to the worklist.
   AND
   Content > **Worklist**

2. Identify related sessions.

   In the session record, choose **Related Sessions** on the left navigation bar.

3. Add a session to all user's schedules.

   In the session record, choose **Flags** on the left navigation bar, and click **Conference Event** option.

Voting on Sessions

1. Turn on voting.

   Content > Session Voting > **Enable/Disable Voting**

2. Give sessions a rating.

   Content > **Session Voting**

3. Turn off voting.

   Content > Session Voting > **Enable/Disable Voting**

4. View voting results.

   Content > **Voting Results**

5. Approve sessions.

   In the session record, choose **Session Details** on the left navigation bar, and choose **Approve** as the **Session Status**.

2: Scheduling Sessions

NOTE
To complete all of the following scheduling tasks, go to Content > Schedule > **Scheduling**.

1. Filter the days, sessions, and rooms available.

   In the Scheduling tool, use these options as appropriate:

   Preview Day — Choose a day.
   Session Type — Choose a session type.
   Session ID — Start typing in a session ID.
   Room Name — Start entering a room name.
   Manually Filter Room — Choose specific rooms to hide or display.

2. Add slot times (if you did not use a template to add slot times).

   Click in the grid square where you want to add the slot time, and complete fields on the **Add a Slot** dialog.

3. Schedule sessions in slot times.

   Drag session from the Select Content list and **drop** on slot time.
   OR
   Double-click on the session, scroll to display the slot time, and **double-click** on the slot time.

   (To remove sessions, click or double-click to move the session back to the Select Content list.)

3: Running Content Reports

1. View reports about sessions, files, and speakers.

   Reports > **Content**

2. View reports about the schedule, rooms, session registrants, speaker schedules, and waiting list.

   Reports > **Schedule**

3. View reports about executive meetings.

   Reports > **Meetings**