Event Console 3.2
Administration Quick Start

Welcome to WingateWeb® Event Console®. This quick start guide outlines the basic workflow for key Event Console administration and management tasks.

When following these instructions, start the System Setup Tasks from the left navigation bar on your Event Console administration site. Start the other tasks from the Modify tab (such as the Modify Event tab within Events > Manage Events or the Modify Attendee tab within Attendees > Manage Attendees).

For detailed instructions, see the Event Console *Administrator Guide* by choosing **Help > Documentation & Support** within Event Console.

Setting up a new system

System Setup Tasks (*on left navigation bar*)

A top-level administrator completes these initial setup tasks.

1. Add event administrators.
   Resources & Inventory > **Administrators**
2. Configure your company profile, and specify which administrators are top-level owners.
   Default Company under Company in lower left
3. Add event families, and specify which administrators own each family.
   Events > **Event Families**
4. Add event types, and set up a survey for each type.
   Events > **Event Types**
5. If desired, edit the labels for event statuses.
   Events > **Event Status Settings**
6. Set up attendee account fields.
   Attendees > **Account Settings**

Event Tasks (system-wide features) (*on Modify Event tab*)

The features in steps 7 through 9 below are used system-wide, but are set up in the Event Tasks list on the Modify Event tab within any event.

7. Customize system-wide email message templates.
   Email Messaging
8. Add agenda types.
   Event Content & Schedule > Agenda Items > **Item Types**
9. Add staff member roles.
   Staffing > **Staff Roles**

Setting up system-wide resources

Administrators complete these additional system-wide tasks. Skip the steps for resources that your company does not use.

System Setup Tasks (*on left navigation bar*)

1. As necessary, add more event administrators.
   Resources & Inventory > **Administrators**
2. As necessary, add more event families, and specify which administrators own each family.
   Events > **Event Families**
3. Add venues, and then add rooms for each venue.
   Resources & Inventory > **Venues**
4. Add hotels, and then add room types for each hotel.
   Resources & Inventory > **Hotels**
5. Add equipment items, assign each item to a family, and upload files for an item.
   Resources & Inventory > **Equipment**
6. Add staff members, and then add the unavailable schedule for each member.
   Resources & Inventory > **Staffing**
7. Add vendors.
   Resources & Inventory > **Vendors**
8. Add language translators, and then assign languages to each translator.
   Resources & Inventory > **Language Translators**
9. Set up any custom reports and charts you want to use.
   Reports > **Manage Reports**
10. Add company-wide dates to the calendar.
    Resources & Inventory > **Calendar Items**
11. Add news articles.
    Resources & Inventory > **News Articles**.

Adding a new event

Administrators can complete these general setup tasks for each event.

Before you begin

Set up system-wide resources (as explained previously on this page).

System Setup Task (*on left navigation bar*)

1. Add an event, or copy an existing event.
   Events > **Manage Events**

Event Tasks (*on Modify Event tab*)

2. If desired, assign the event to multiple event families.
   Family Assignment
3. Assign an owner for the event.
   Administrators
4. Create or customize event-specific email message templates.
   Email Messaging
5. Assign an event type.
   Event Type & Details
6. Assign roles to staff members.
   Staffing > **Add New**
7. Reserve equipment.
   Equipment
8. Publish event-specific documents, as desired.
   Documents
9. Choose the supported languages.
   Languages
10. Assign vendors.
    Vendors

Setting up the event agenda and sessions

System Setup Tasks (*on left navigation bar*)

1. Add the venue.
   Resources & Inventory > **Venues**
2. Add rooms for the venue.
   Resources & Inventory > Venues > **Room List**
3. Add the speakers as a staff members.
   Resources & Inventory > **Staffing**

Event Tasks (*on Modify Event tab*)

4. Add agenda types, as needed.
   Event Content & Schedule > Agenda Items > **Item Types**
5. Add agenda items.
   Event Content & Schedule > Agenda Items > **Add New**
6. Preview your agenda.
   Event Content & Schedule > Agenda Items > **Preview**
7. Add presentation content.
   Event Content & Schedule > Presentation Content
8. Schedule the session.
   Event Content & Schedule > **Session Scheduling**
9. Set up session surveys, if desired.
   Event Content & Schedule > **Session Survey**
10. Change the event status to Approved.
    General Information
11. Publish the Attendee Calendar.
    Publish tab
12. Set up attendee registration.
    (See **Setting up attendee registration** below.)

Setting up attendee registration

Event Tasks (*on Modify Event tab*)

1. Set up payment options.
   Attendee Groups > **Page Setup: Payment**
2. Write the cancellation and refund policy.
   Attendee Groups > **Page Setup: Payment**
3. If attendees can reserve a hotel room after registering for this event, set up hotel room blocks.
   Hotel Rooms

Event Tasks | Attendee Groups (*on Modify Event tab*)

Repeat steps 4 through 11 for each attendee group.

4. Add the attendee group.
   Attendee Groups
5. Specify an owner and quantity of group members.
   Attendee Groups > **General Info**
6. Set up survey questions, as desired.
   Attendee Groups > **Page Setup: Profile**
7. Set up purchase items.
   Attendee Groups > **Page Setup: Purchase**
   (For details, see **Adding a purchase item for an attendee group** below.)
8. Set up the Payment page.
   Attendee Groups > **Page Setup: Payment**
9. Set up the Confirmation page.
   Attendee Groups > **Page Setup: Confirm**
10. If desired, create and publish a post-registration survey.
    Attendee Groups > **Survey Management**
11. If desired, add attendees to attendee groups. (Attendees may be added to groups automatically during registration.)
    Attendee Groups > **Group Members**

Event Task

12. Change the event status to Approved.
    General Information
13. Publish Attendee Registration.
    Publish tab

Adding a purchase item for an attendee group

Event Tasks | Attendee Groups (*on Modify Event tab*)

These steps are just a summary; follow screen prompts to go from one step to the next.

1. Add the attendee group, and any child groups for which you want to set up discounts.
   Attendee Groups
2. Access the purchase item setup page.
   Attendee Groups > **Page Setup: Purchase**
3. Choose the attendee group for which you want to add the purchase item: Attendee Group:
4. Complete general information about the purchase item.
   Add New
5. If payment is required, set up price points.
   Add Price Point (on the second page of creating a purchase item)
6. To set up discounts, modify the purchase item within the child group.
   Choose the child group Attendee Group:, then right-click on the item and choose **Modify Group Discount**
7. Write page instructions for the Purchase page.
   Page Instructions

Registering an attendee for an event

Before you begin

Set up attendee registration (as explained in **Setting up attendee registration** on this page).

System Setup Tasks (*on left navigation bar*)

1. Create the new attendee, and enter contact information.
   Attendees > **Manage Attendees**

Manage Attendees | Event Registration Activity (*on Modify Attendee tab*)

2. Assign the attendee to an event, and choose register.
   Event Registration Activity, click **Add New**, and then right-click on the event and choose **Register**
3. Assign the attendee to attendee group(s) for the event.
   Event Registration Activity > **Group Membership**
4. Enter the attendee's responses to profile questions.
   Event Registration Activity > **Profile Information**
5. Purchase items and enter the attendee's payment info.
   Event Registration Activity > **Purchases & Payments**
6. As necessary, add a purchase order number or send an invoice.
   Event Registration Activity > Purchases & Payments > **PO Number & Send Invoice**
7. Reserve sessions.
   Event Registration Activity > **Session Reservation**
8. Reserve a hotel room.
   Event Registration Activity > **Hotel Reservation**
9. If attendee is on a wait list, view wait list status.
   Event Registration Activity > Purchases & Payments > **Purchase Wait List**
10. Add notes about the registered attendee, if desired.
    Event Registration Activity > **Notes**