Conference 6.0 Content Setup Quick Reference: Level 2

This quick start guide outlines the basic workflow for key Content setup 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 or refer to your training guide.

This document includes these sections:

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

If you will use ActiveEvents Conference to manage content (including sessions, speakers, and presentation files), complete these setup tasks:

1: General Session Record Setup

1. As desired, edit session field labels.

   Setup > Content > General > **Field Labels**

2. Set up session preferences.

   Setup > Content > General > **Session Preferences**

3. Set up session types, and the lengths for each type.

   Setup > Content > General > **Session Types**

4. Create or edit session statuses.

   Setup > Content > General > **Statuses**

5. Create or edit technical levels.

   Setup > Content > General > **Technical Level**

6. As necessary, create or edit content flags.

   Setup > Content > General > **Content Flags**

   IMPORTANT: Consult with your ActiveEvents Business Analyst as you create or edit content flags.

7. As desired, create custom fields to help you track session information within the Conference Administrator, and assign the fields to custom field locations.

   Setup > General > **Custom Fields**

   You can display custom fields on these pages in the session record:

This session record page	Displays fields assigned to this custom field location
Session Details	Session Details (Admin)
Session Profile	Session Profile (Admin)
Session AV Requirements	Session AV Requirements

8. If you plan to import session record data from a file, create a data import template.

   Setup > General > Imports & Exports > **Import Templates**

2: Call for Papers

If you will use ActiveEvents Conference to manage a call-for-papers process, complete these tasks:

1. Set up general Call for Papers settings.

   Setup > Content > Call for Papers > **General Settings**

2. If you want to gather custom information during the call for papers, assign the appropriate session-related custom fields to custom field locations.

   Setup > General > **Custom Fields**

   You can display custom fields on these pages during the Call for Papers process:

This Call for Papers page	Displays fields assigned to this custom field location
Welcome page	Front Page (CFP)
Step 1: General Information	Add New Session
Step 2: Proposed Speakers	Proposed Speakers
Step 3: Session Profile	Session Profile (CFP)

3. Set up the Create Account page.

   Setup > Content > Call for Papers > **Simple Account Create Setup**

4. Set up Call for Papers paths for different session types.

   Setup > Content > Call for Papers > **General Settings**,

   and then copy a path to create a new one

5. Activate the Call for Papers site.

   Setup > Content > Call for Papers > **General Settings**

3: Voting

1. Set up voting options.

   Setup > Content > Session Voting > **Ballot Options**.

2. Specify the session statuses that are included in voting.

   Setup > Content > Session Voting > **Voting Search**

3. As desired, set up custom fields related to voting:

This voting page	Displays fields assigned to this custom field location
Session Voting page (fields used in searching for sessions to vote on)	Session Voting Search Criteria
Session Voting Pop-Up (display only fields)	Session Voting

4: Speakers and Participants

1. Create or edit content participant roles.

   Setup > Content > Speakers & Participants > **Participant Roles**

2. Set up participant session preferences.

   Setup > Content > Speakers & Participants > **Participant Preferences**

3. If desired, configure rules to automatically assign roles to session participants.

   Setup > Content > Speakers & Participants > **Auto Role Assignment**

5: Content Tasks

1. Create content tasks (tasks completed once per person, once per session, or once per presentation file).

   Setup > Content > **Content Tasks** > **Tasks**

2. Assign tasks to participant roles for specific session types.

   Setup > Content > **Content Tasks** > **Task Mappings**

3. Set up preferences for content tasks.

   Setup > Content > **Content Tasks** > **Task Preferences**

6: Schedule

1. Specify schedule time preferences.

   Setup > Content > Schedule > **Time Preferences**

2. If desired, set up day groups for grouping days on the schedule.

   Setup > Content > Schedule > **Day Groups**

3. Set up days for your session schedule.

   Setup > Content > Schedule > **Days**

4. Set up rooms in which sessions will take place, and assign a session type to each room.

   Setup > Content > Schedule > **Rooms**

5. Add colors to use to indicate different types of sessions on your session schedule.

   Setup > Content > Schedule > **Colors**

6. Set up slot times to represent each day, time, and room combination on your session schedule.

   Setup > Content > Schedule > **Slot Times**

7. If desired, create templates that let you add slot times to your session schedule automatically, then apply the template. (Slot times represent a specific day, time, and room.)

   Setup > Content > Schedule > **Templates**

7: Session Catalog and Personal Scheduler (SCPS)

1. Set up tabs that help attendees search for sessions in the session catalog.

   Setup > Content > Catalog & Personal Scheduler > **Searchable Tabs**

2. Set up general preferences for SCPS.

   Setup > Content > Catalog & Personal Scheduler > **General Prefs**

3. Set up waiting list preferences, if desired.

   Setup > Content > Catalog & Personal Scheduler > **General Prefs**

4. Set up preferences for the My Interests list.

   Setup > Content > Catalog & Personal Scheduler > **My Interests Prefs**

5. Set up preferences for the conference-wide and session-specific surveys that display within SCPS.

   Setup > Content > Catalog & Personal Scheduler > **Survey Prefs**

6. If you want a catalog of exhibitors to display in SCPS, choose display preferences for the catalog.

   Setup > Content > Catalog & Personal Scheduler > **Exhibitor Catalog Setup**

7. Set up rules that determine which users can log in to the scheduler in SCPS.

   Setup > Users > Login Rules > **Scheduler Login Rules**

8: Session Access Control (SAC)

If you will use SAC, consult with your ActiveEvents Business Analyst to define your access and badge rules.