Release Notes for ActiveEvents Conference™ 6.2 - November 2010

Price Point Management and Reporting
The setup and management tools for prices, discounts, and cancellation fees for both attendee registration packages and exhibitor packages have been redesigned.

As in previous releases, each package can be configured with a standard price and date-based discounts (such as early-bird prices), as well as qualifying discounts (based on custom field values or registration codes). Now each price point is also assigned to a report category; the event administrator sets up the categories for each event. As an option, an administrator can specify an expected quantity for each price point to help with revenue projections.

All prices, discounts, and fees for attendee registration packages are managed from a new central Package Pricing page. Likewise, the pricing for all exhibitor packages are managed from a central page. As in previous releases, standard prices and cancellation fees may still be specified as packages are created, and discounts may be specified as registration codes are created; however, the Package Pricing page makes it easy to view and edit all prices, fees, and discounts related to a package from one place.

A Price Point Revenue report makes it easy to see how many attendees or exhibitors have purchased packages at a certain price point or for a certain category. The report also shows projected revenue compared to actual revenue for each price point based on the expected quantity and the number of items currently purchased at that price. Additional reports let an administrator verify that attendees or exhibitors receive the price points they are qualified to receive. Price point information may also be added to custom (ad hoc) reports.

To use these new features, an administrator can go here in the Admin Tool:

Setup > Users > Reg Setup Wizard > Package Pricing
Setup > Exhibitors > Packages > Exhibitor Package Pricing
Setup > Reports > Price Points
Reports > User > Financial Reports > Price Points

For more information, see the "Registration Setup" chapter in the *Registration Guide* and the "Exhibitor Setup" chapter in the *Exhibitor Guide*.

Once prices and discounts are set up, the price point rules are automatically enforced when managing purchases in a user record or exhibitor record. Previously, a registration manager or call center attendant could edit the price for a package for an individual buyer. Now, only those users or exhibitors that are qualified (based on registration code, attendee type, exhibitor type, etc.) may receive a lower price.

For more information, see the "Registration Management" chapter in the *Registration Guide* and the "Exhibitor Management" chapter in the *Exhibitor Guide*.

Edit Order Billing Info from the Admin
A new "Edit Billing Info" feature has been added to the Order History page in user records to let administrators edit the billing information that displays on an invoice. This is especially important for tax purposes for European invoicing.

In a related change, a new default custom field called Billing Company Name allows an invoice to show a company name that is different from the person's company name. If the Billing Company Name field is added to the user record and the field contains data, the name in that field will appear on the invoice instead of the name entered in the Company field on the Contact Information page in the user's record.

Tax Invoice Bulk Download
An administrator can now download all tax invoices for an event for a specified date range. The invoices are saved as PDF files and zipped up in a single ZIP file.

Turn Off Payment System
An administrator can now turn off the payment system at the close of an event after all payments have been reconciled. Turning off the payment system automatically closes attendee Registration and prevents anyone from adding, changing, cancelling, or refunding user registrations or exhibitor orders. (Previously, a developer had to turn off payments or else payments remained active until the event was no longer online.)

To manage this, a new preference has been added to the Global Settings in the Registration Setup Wizard.

Exhibitor “Shop Window” in ActiveEvents Connect™
Exhibitors can now display more information about their company in ActiveEvents Connect. A new “Shop Window” page lets exhibitors display the following information for attendees to view:

- Contact information.
- Company logo
- YouTube video
- Product information (or other files)
- Sessions related to this exhibitor
- Attendees who are interested in this exhibitor

(In previous versions of Connect, an exhibitor profile displayed only the company name and description, and a list of interested attendees.)

The exhibiting company must designate one person as their Network Contact who will set up and manage the page. The Network Contact can communicate with interested attendees through Connect messaging.

Display or Hide ActiveEvents Connect™ Features
An administrator can now choose which of these features to display in ActiveEvents Connect for an event:

- Map View
- People
- Sessions
- Exhibitors
- Groups

This is managed in the Admin under **Setup > ActiveEvents Connect > ActiveEvents Connect Preferences**. (In previous versions of Connect a developer had to hide any features that were not being used for an event.)

iPad™ Onsite Tools for Administrators
Event administrators can now easily view event statistics and onsite activity from an Apple® iPad™. The administrator can view a variety of reports for six main areas:

- Key Accounts
- Exhibitors
- Registration
- Sessions
- Attendees
- Surveys

In addition to viewing reports, administrators can use the iPad to check in and print badges for registered attendees who have paid for the event.

(For setup tips, see the “General Event Administration” chapter in the *Administrator Guide*.)

Meetings Updates
Attendees can now access the Meetings module from a single link on the left navigation panel. In addition, for each path, you can choose whether to let users filter a specific meeting type by topic, automatically add a meeting requester as a meeting attendee, and prevent meeting requesters from removing themselves as attendees at the meeting they are requesting.

Meeting Access Control (MAC)
Meetings Access Control is an onsite tool that works with the Meetings module. Purchased as a separate add-on, this tool does the following:

1. Reminds meeting participants of the time and location of their next approved meeting when they scan their badge.
2. Tracks meeting attendance regardless of the room where the meeting is being held.
3. Allows meeting hosts to change a meeting room, if necessary.

Content Tasks
Several new Content Task features have been added to the Speaker Resource Center (SRC) and the Admin:

1. In the SRC, content tasks are divided onto different tabs for session tasks, participant tasks, and presentation file tasks.

2. A new review process has been designed for presentation file tasks. For each file task, an administrator can set up additional review tasks. Each reviewer sees his or her assigned file review tasks on a separate tab in the content task area of the SRC.

3. An administrator can now set up content tasks to automatically assign custom field values to users or sessions when those tasks are completed. Completion of participant tasks can assign values to user records and completion of session tasks can assign values to session records. This is useful in reporting. (For example, a "Biography Updated - Yes" profile value can be assigned to a session speaker after the Update Bio task is completed. Then the content manager can create a custom report that will show which speakers have updated their biographies.)

4. A registered speaker no longer needs to mark the Registration task as complete in the SRC. The task is automatically marked as complete when the speaker registers for the event.

Session Participant Survey Questions
If you have sessions that involve multiple presenters, you can create session survey questions that will gather information about each person individually. On a survey, these participant questions display separately for each participant.

You can also choose to show speaker evaluations on the SRC home page. Depending on your setup choices, speakers may see the results from any questions that are not participant-specific as well as their own results from the multiple participant questions.

Dashboard Widget Updates
You can now specify the number of chart items (between 6 and 20) that should display in pie, bar, and line chart widgets. Additionally, four new session-related widgets have been added to Conference:

- Approved Sessions (session table chart)
- New Sessions (session table chart)
- Session By Status (pie chart)
- Session Enrollment (pie chart)

Custom Field Hierarchy
An administrator can now configure a hierarchy for custom field values. In custom field setup for fields with a predefined list of responses (including select, radio, check box, and multi-select custom fields), the administrator can click Show Advanced Options and then choose the hierarchy order for List Items. If a hierarchy is configured, an administrator can use Custom Reports to report on the profile values, either by all the values on the record (current functionality) or by the hierarchy value, only displaying the highest value in the hierarchy. On the Checkin Rules page (used to configure the data printed on badges), a new "Use Hierarchy" check box lets the administrator choose to print only the highest value in the hierarchy on the badge, not all profile values that the attendee has.

Updates to "Behavior" Setting in Custom Field Setup
In custom field setup, the "Behavior" configuration field has been renamed "Session Scheduling Limitations." This name change makes it clear that the field is used only to control which attendees can view and schedule sessions. Additionally the options for this configuration field have been renamed and a new option has been added:

> **None** (formerly Soft). All users can both view and schedule the session when this field is on both user and session records.
>
> **View only** (formerly Medium). All users can view the session in the Session Catalog, but only users who have a matching value can schedule the session.
>
> **View and schedule** (formerly Hard). If the user's value is the same as the session value, the user can both view and schedule the session.
>
> **Can NOT view or schedule** (new option used for excluding). If the user's value is the same as the session value, the user can not view or schedule the session.

Synchronize Records to Auto-Assign Values or Status
Sometimes it is necessary to change the setup for a registration package, registration code, or custom field after a user already has that package, code, or field assigned to their record. A new Sync Values page in the Admin allows changes to auto-assigned custom field values or person registration status to be auto-populated to records. (For example, if a user buys a VIP package and the administrator later decides that everyone who buys the VIP package should also get a complimentary dinner, the dinner can be added to the package as a custom field value. Synchronizing will retroactively assign the dinner profile value to every user who has already purchased the VIP package.) Four types of data can be synchronized: person status, registration code profile values, purchase profile values, and auto-assigned profile values.

(To use this feature, an administrator can go to **Setup > General > Sync Values** in the Admin Tool. For instructions, see the "General Event Administration" chapter in the *Administrator Guide*.)

For details on improvements in Conference 6.2 and previous releases, go to **Help > Release Notes** in the Conference Admin Tool.