

Conference 4.9 Content Quick Reference

This quick start guide outlines the basic workflow for key Content administration and management tasks in the WingateWeb 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 PDF documents at <http://www.wingateweb.com/support>

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1: Setting Up Content

NOTE

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

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

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 WingateWeb Project Manager 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 Detail	Session Detail Profiles
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 > **Data Import Templates**
(To manage session records, see [2: Managing Session Records](#) on page 3.)

Call for Papers

If you will use WingateWeb 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	Session Fields (CFP)
Step 2: Proposed Speakers	Proposed Speakers (CFP)
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**

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 Page
Session Voting Pop-Up (display only fields)	Session Voting

(To manage and complete voting, see [Voting on Sessions](#) on page 3.)

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**

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**

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**

(To add sessions to the schedule, see [3: Scheduling Sessions](#) on page 3.)

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**

Meetings

If you will use the WingateWeb Conference system to manage one-on-one meetings, complete these tasks:

1. Specify general meeting preferences.
Setup > Content > **Meetings Preferences**
2. Add meeting slot times to your session schedule.
Setup > Content > **Schedule**
3. If desired, set up meeting topics that you can assign to meeting hosts. (You set these up as values for the Meeting Topics custom field.)
Setup > General > **Custom Fields**
4. Add the Approves Meeting Hosts custom field to the user record.
Setup > General > **Custom Fields**, and then add the field to the **User Profile (Admin)** custom field location
5. Set up the Meeting Host flag for users who are allowed to host meetings.
Users > **Add New User**, and then choose **Advanced > Flags** on the left navigation bar in the user account
6. Set up rules that determine which users can log in to one-on-one meetings.
Setup > Users > Login Rules > **Executive Meeting Login Rules**
7. Edit email messages related to meetings, as desired.
Setup > General > Email Messages > **Predefined Emails**

Session Access Control (SAC)

If you will use SAC, consult with your Project Manager to define your access and badge rules.

2: 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 3 for details.)
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 used 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**.

3: 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.)

4: 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**
4. Create custom reports, as desired.
Reports > **Create Custom Report**, and choose **Content** as the report type.