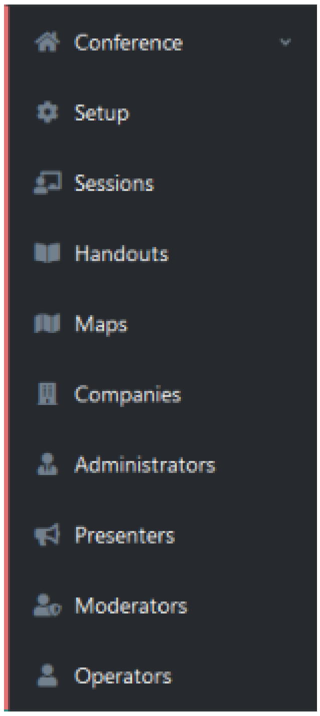
Conference

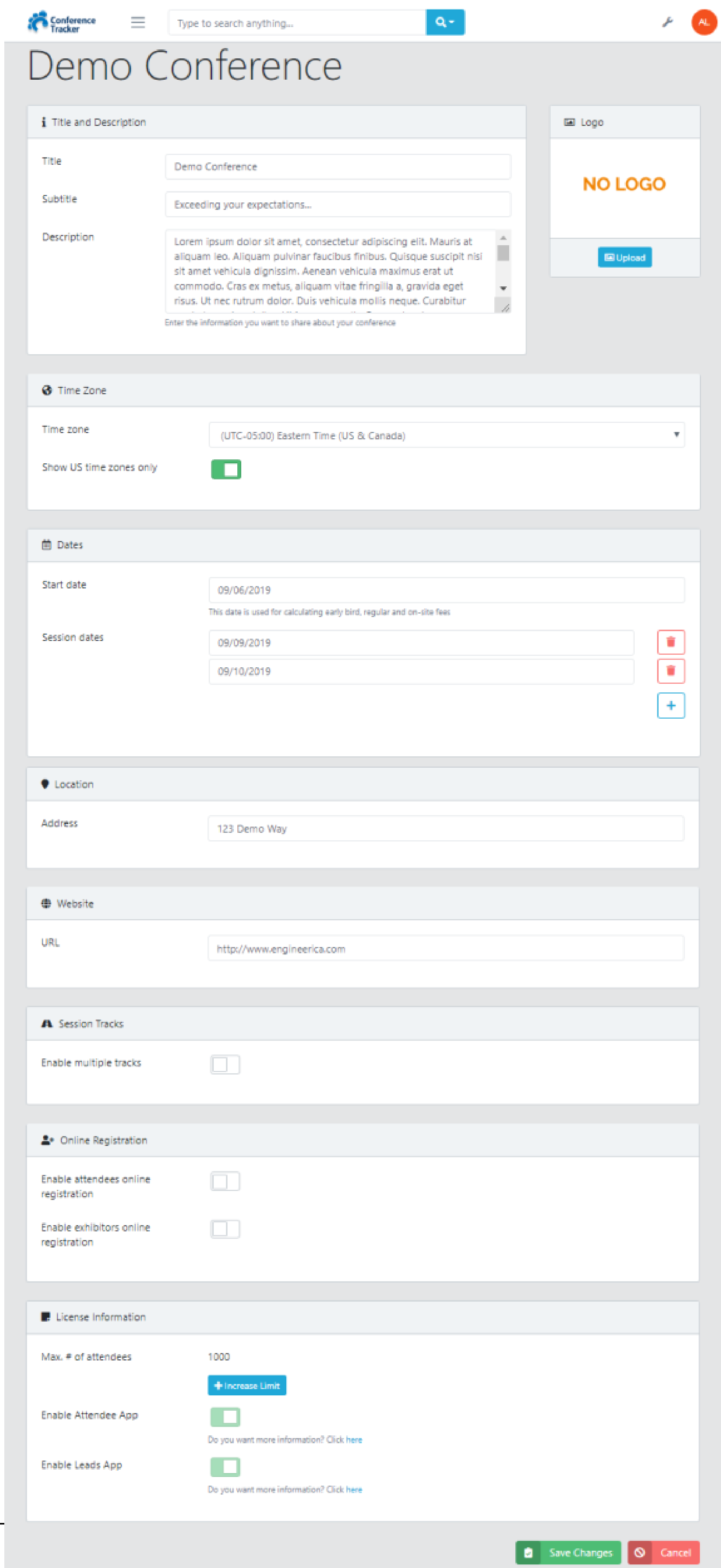
The **Conference** menu on the left-hand menu bar allows you to configure the following information:



- **Setup** - This allows you to configure when and where the conference is taking place as well as enable conference options such as enabling online registration for the **Attendees** and/or **Exhibitors**.
- **Sessions** - This allows you to create the **Sessions** or **Workshops** that will take place at the conference based on the **Conference Dates** (enter in the Basic Info) and **Rooms** available.
- **Hand-outs** - This section allows you to manage **Handouts** that you may want to track which **Attendees** received.
- **Maps** - This section allows you to upload an image or document of a map that can be accessed by attendees using the **Attendee** app.
- **Companies** - This section allows you to create and manage the companies that will be attending your conference as exhibitors.
- **Administrators | Presenters | Moderators | Operators** - These sections allow you to define the **Users** into one or multiple **Roles** that will help out at the conference. Each role is explained in greater detail below.

Setup

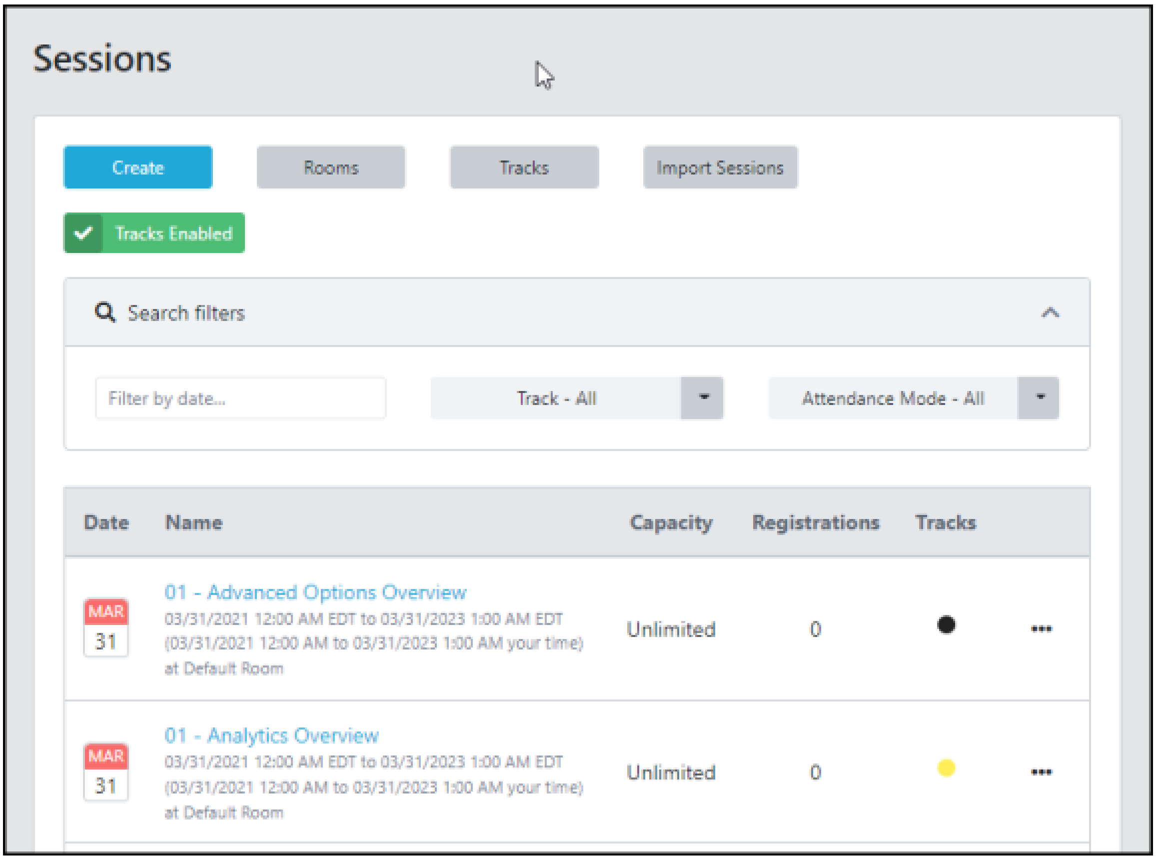
The **Setup** section allows you to enter the following:



- **Title**: Complete with the name of your conference that will appear in the app for Attendees.
- **Subtitle**: Complete with the slogan for the conference that will appear in the app for Attendees.
- **Conference Description**: Write a description for your conference. This will be displayed in the Info section of the **Attendee** app.
- **Conference Logo**: Upload a Conference Logo that will be used in the App for Attendees.
- **Time Zone**: Set your Time Zone that the conference is taking place in so when you import the data it will sync with mobile devices properly.
- **Conference Dates**: Set up the start date and the dates that the conference is going to take place so the Attendees can see what is happening on these days and so you can schedule workshops/sessions on these days.
- **Address**: Add the address that this Conference will take place so the Attendees can get directions, find local places of interest, and more from the **Conference Attendee** app.
- **Website**: Add the conference or organizations website that will appear in the app for guests.
- **Session Tracks**: Enabling this option will allow you to group your sessions/workshops into categories. This will be explained in greater detail in the **Sessions** section.
- **Online Registration**: This section allows you to enable online registrations for **Attendees** and/or **Exhibitors**. This feature also offers the ability to accept Credit Card or PayPal payments using your own PayPal account through the registration process.
- **Max # of Attendees**: Displays your current limit on attendees. Clicking on **Increase Limit** will notify the Conference Tracker support team of your request.
- **Attendee App**: Shows if your account has the Attendee app enabled or not. Clicking on **Enable** will notify the Conference Tracker support team of your request.
- **Leads App**: Shows if your account has the Leads app enabled or not. Clicking on **Enable** will notify the Conference Tracker support team of your request.

Once you have set the previously mentioned information you must click the **Save** button for the changes to be set.

Sessions



In this section, you can manage your **Workshops/Sessions** for your conference. Here you can **Create Sessions**, **Rooms**, and **Tracks** by pressing on the buttons labeled as such along the top of the section. On the far right, you can see a button labeled **More**. Clicking on this will give you an option to import .csv files that will expedite the session creation process (see: Conference Tracker - Session/Workshops Import). Under these buttons, you will see a **Search Filter** section. These will help you navigate through your sessions quicker.

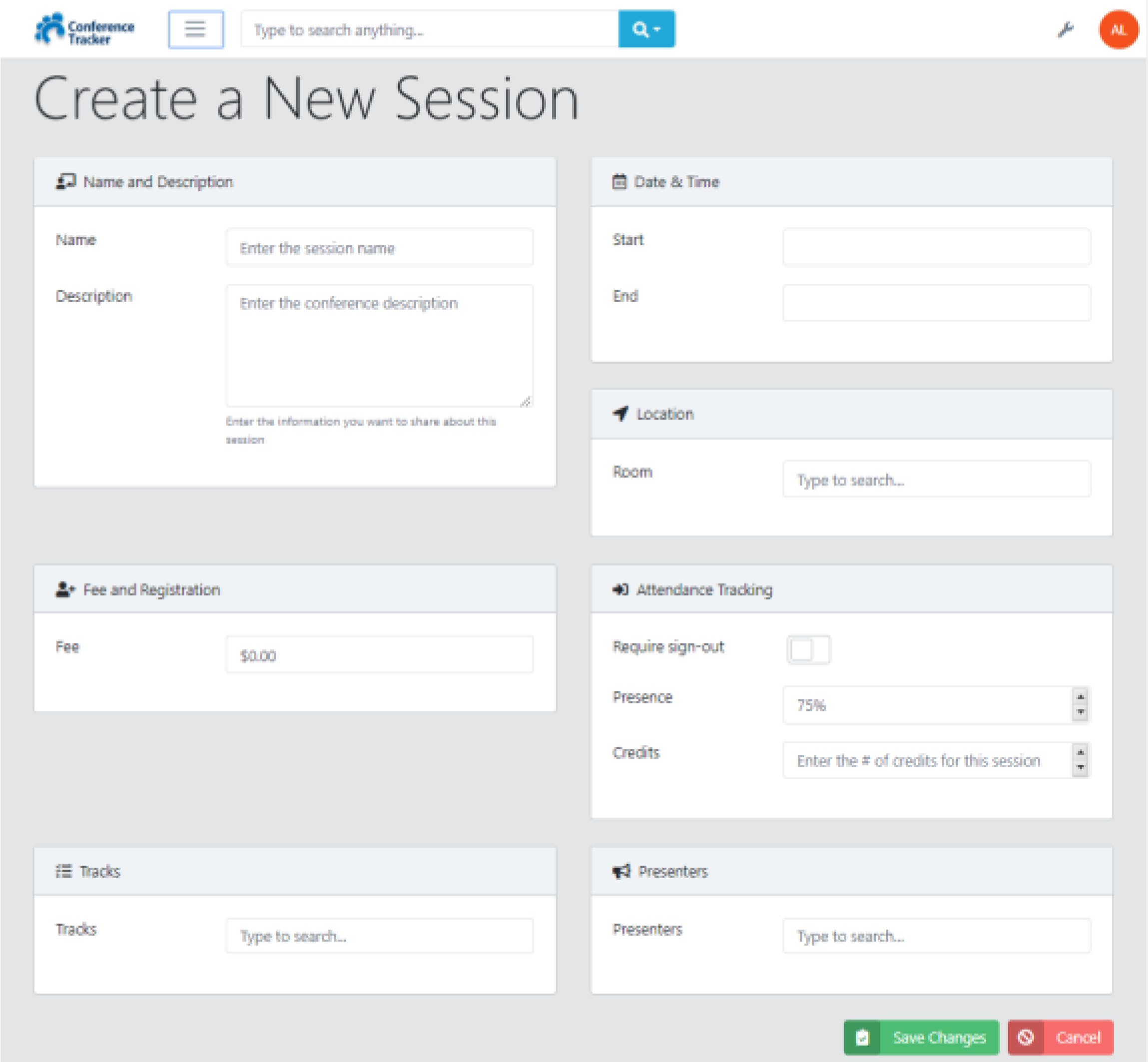
If you already have sessions created, you can edit them by clicking on their title on this list. On the far right end of each session, you will see three dots. These three dots give you extra options for your sessions, including:

- **Registration** - Use this option to see who of your **Attendees** are registered for this **Session/Workshop**.
- **Session Details** - Use this option to get an attendance report and statistics about the session.
- **Delete** - Use this option to remove the **Session** from the conference. You will then have to click a popup message to confirm this deletion.

If you attempt to create a session without creating any rooms, you will receive an error and will not be able to finish creating your session.

Create Workshop/Session

To manually enter a session/workshop you click on the **Create** button from the **Sessions** screen. Once you get to the **Create** form, fill out the information. Once done, click **Save Changes** to create.



Name - This is the name of the workshop that you want to appear on the Apple devices and in Conference reports.

Description - Optionally give this **workshop/session** a description which **Attendees** will see when choosing them on the Online Registration form.

Start/End Date and Time - This is the date of this workshop. When the field has been clicked, a small calendar window will pop up to help you pick your date and time for the session. If the chosen date isn't a date when the conference is taking place, it will be added to the Conference Dates under your Conference Setup section.

Location/Room - This is the **Room** that this workshop will take place. You can search through all available rooms here. If no rooms have been created, you will not be able to finish your session successfully. ***Always create rooms before-hand!***

Fee - This is the optional fee that can be added for signing up to attend this class from the Online Registration form.

Capacity - This is to let the system know how many Attendees can signup for the **workshop/session** before it becomes full on the Online Registration form.

Require Sign-out - Check this off if you want the Attendees to have to swipe out at the end of the session.

Presence - This is the percentage of time they must have been signed in for to obtain the credits for this **workshop/session**. ***Note:*** *Even if you do not require them to sign-out it will require you place a 1 in the **Required Presence** field.*

Credits - This item states how many credits the Attendee will earn if meeting the attendance requirements of this **workshop/session**.

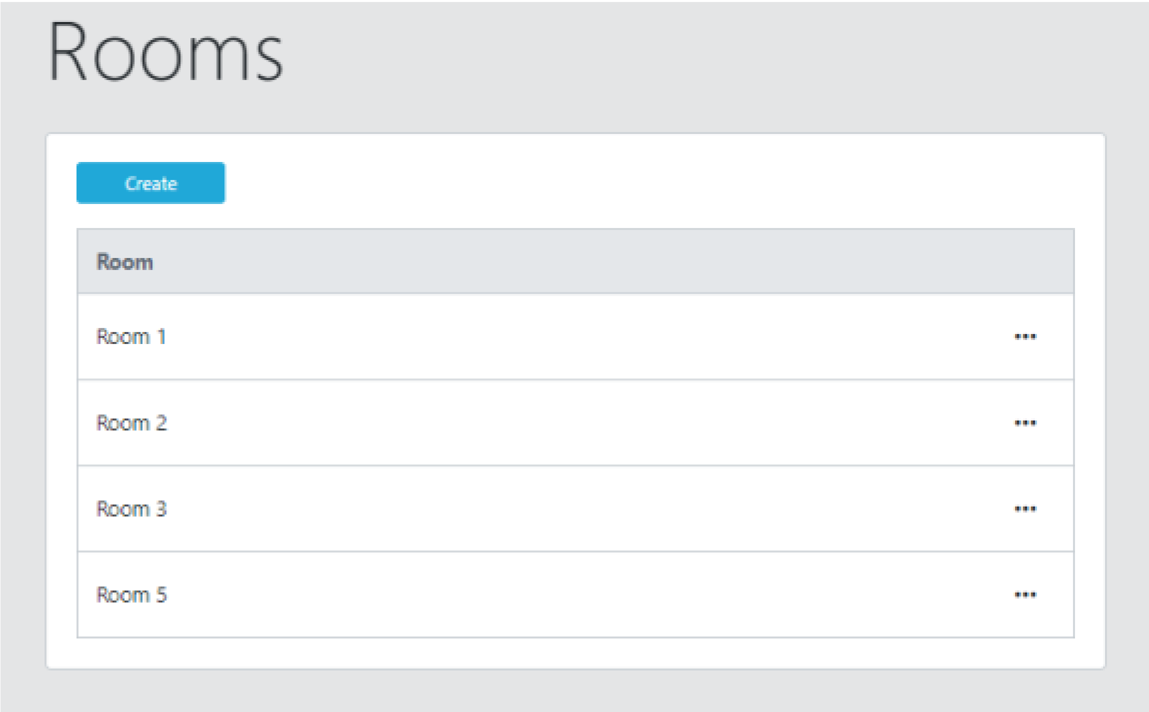
Tracks - With Tracks, you can group together your sessions with custom created categories.

Presenters - This is an optional field to specify the person speaking at the **workshop/session**.

Custom Fields - These are the custom fields are in setup in the Settings of the Conference Tracker account. If not using these fields simply ignore them. You can also import these on the Attendee import and display them on certificates and transcripts.

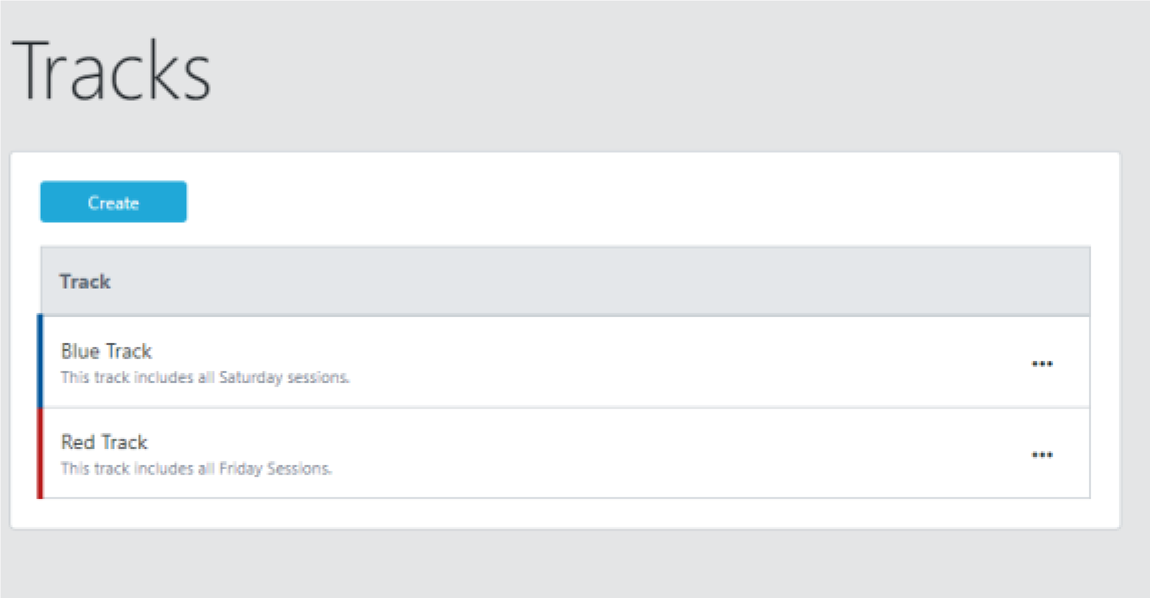
Rooms

From the Conference Sessions screen, clicking on the **Rooms** button will take you to a screen where you can see a list of all the rooms you have created. If you have not started creating rooms this can be done by clicking on the **Create** button.



- **Create** - Clicking on the **Create** button on the **Rooms** screen will take you to the Room Creation page. To create a new room, simply fill in the **name** and **location** of the room and click Save. **Note**: Both of these must be filled out.

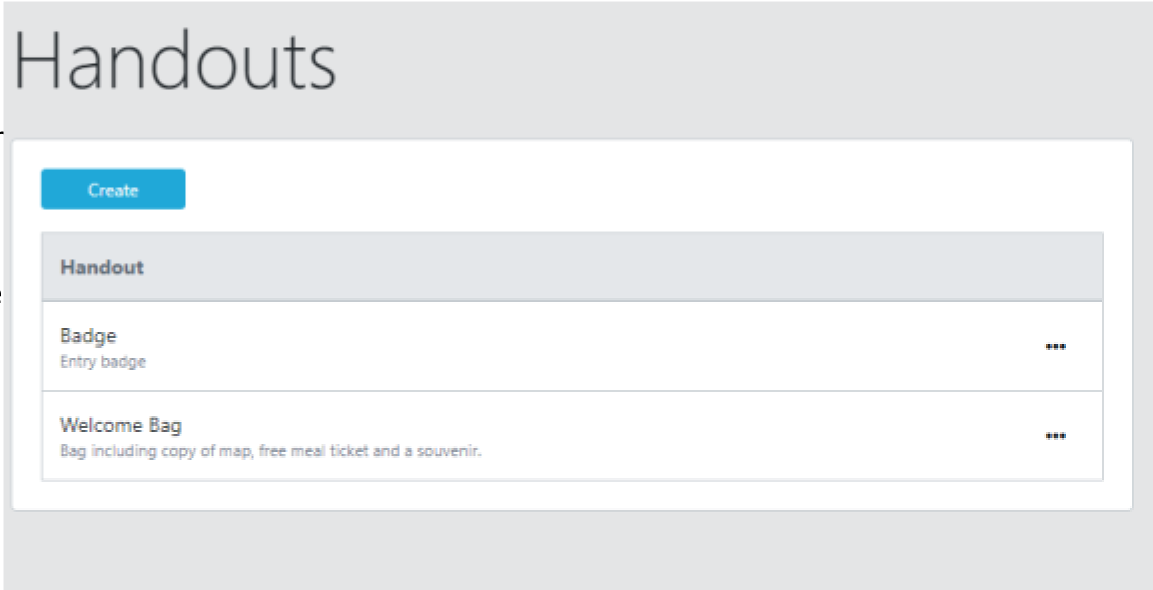
Tracks



Tracks are a way to organize your sessions, for both yourself and your attendees. You can create multiple tracks and list one or more sessions under each. These will then be grouped under a Track title and can be offered to your attendees as a specific pack of sessions when registering. Tracks are optional, and can be enabled/disabled under the Setup screen in the Conference section of the Dashboard.

- **Create** - This will take you to the Create Track screen, which will ask for the color of your track, a title and a description.

Handouts

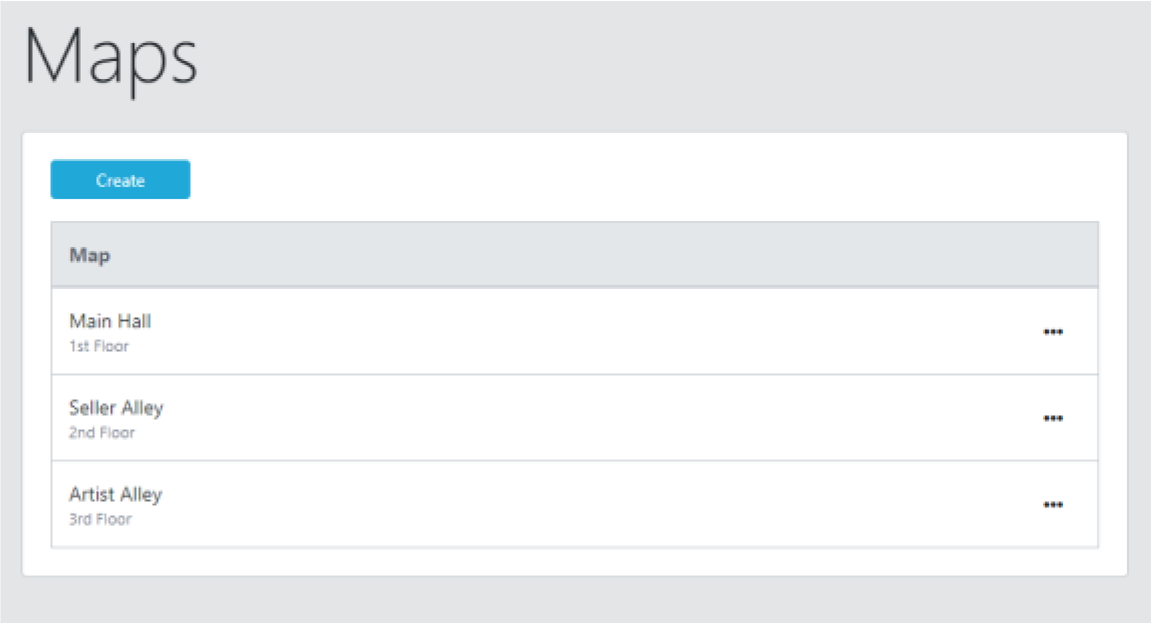


In this section you create items that folks will complete or pickup during the **Check-In** process. This works more like a checklist to help check-in operators remember what each attendee should be receiving once they are checked in.

- **Creating Handouts** - Clicking on the Create button will take you to the Create Handout screen. Here you can add a name to your handout and provide a brief description.
- **Deleting Handouts** - By clicking on the three dots on the far right of any created handout, you can choose to delete the handout.

You should be careful deleting these items because once the **Handout** is deleted any information you may have wanted to **Export** or **Report** on is lost along with it. Make a careful decision before confirming the pop-up confirmation box that appears to delete this item.

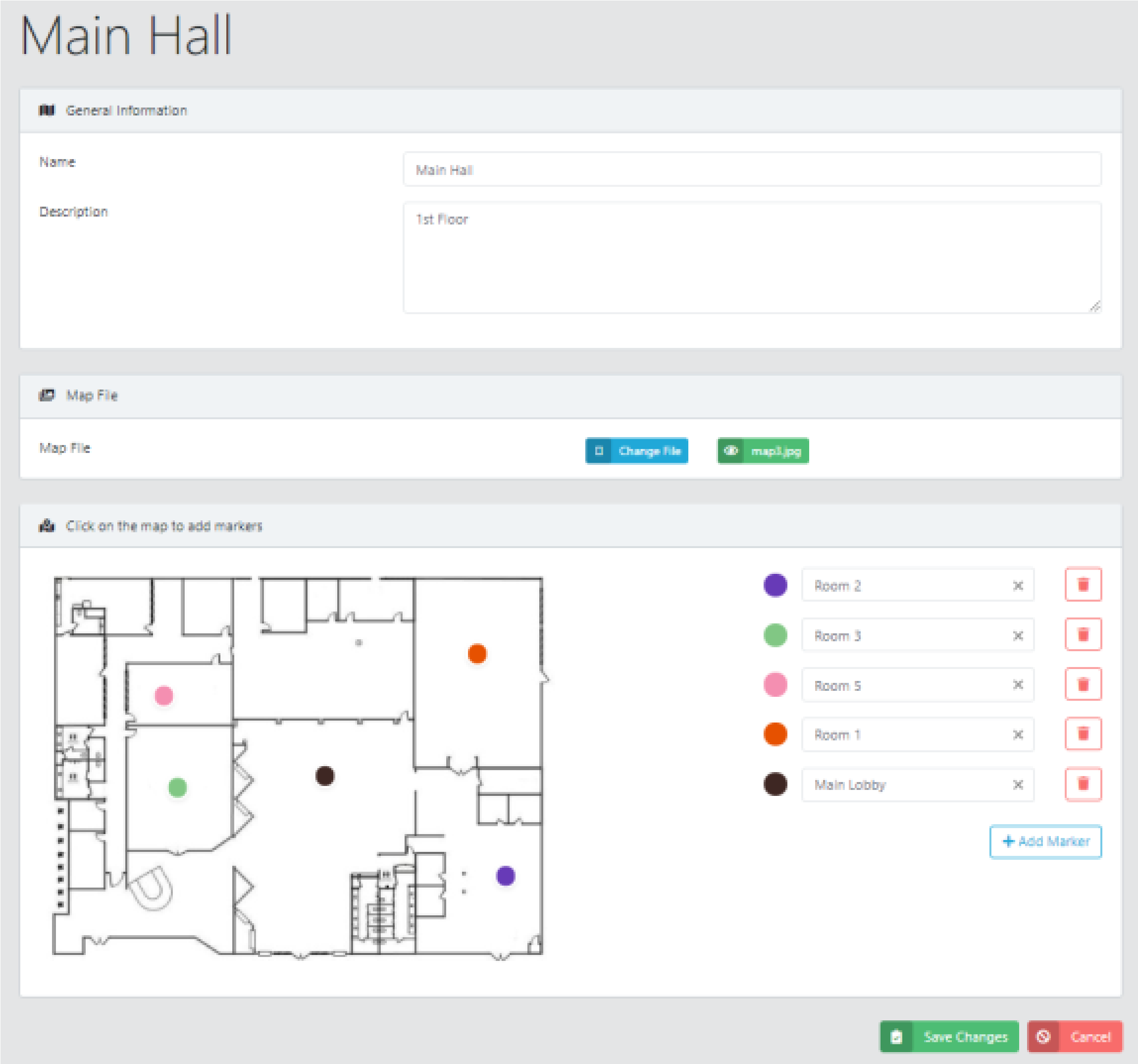
Maps



In this section, you can upload either an image or document file to be used as a map for the attendees. These maps can only be accessed by attendees using the Attendee app.

Create a Map

To begin creating a new map, simply click on the **Create** button on the top left of this page. Then follow these steps:



1. Enter a name for the map. This will be displayed on the Attendee app for your attendees to see.
2. Optionally, you can enter a description for the map.
3. Upload a file to be used as the map. You can upload standard image file types (such as .jpg or .png) and even PDFs.
4. Click the **Save** button on the bottom of the page once you're done to finish.

Markers

You also have the ability to place markers on maps. Attendees are able to see markers you've placed on the map by accessing the map from the Attendee app. To begin creating a marker, click on one of your available maps from the **Maps** page.

From here, you should be able to see a preview image of the map. To create a marker, follow these steps:

1. Click anywhere on the image to begin creating a marker. A new marker will appear. You can also create a new marker by clicking on the Add Marker button on the right hand side.
2. On the right hand side, you will see the marker you just created with a color and a name.
3. You can change the name of the marker by changing the text in the field marked **Specify room or lab**.
4. You can change the color of the marker by clicking on the marker itself and choosing a new color from a preset list of colors.

5. When you're done, click **Ok** to finish setting up your marker.

You can move your marker around the map by clicking and dragging it.

To remove a marker, click on the red Trash Can icon next to the name of the marker.

Click on **Save** on the bottom of the page once you're done making changes to your map.

Delete a Map

To delete a map, you have two options:

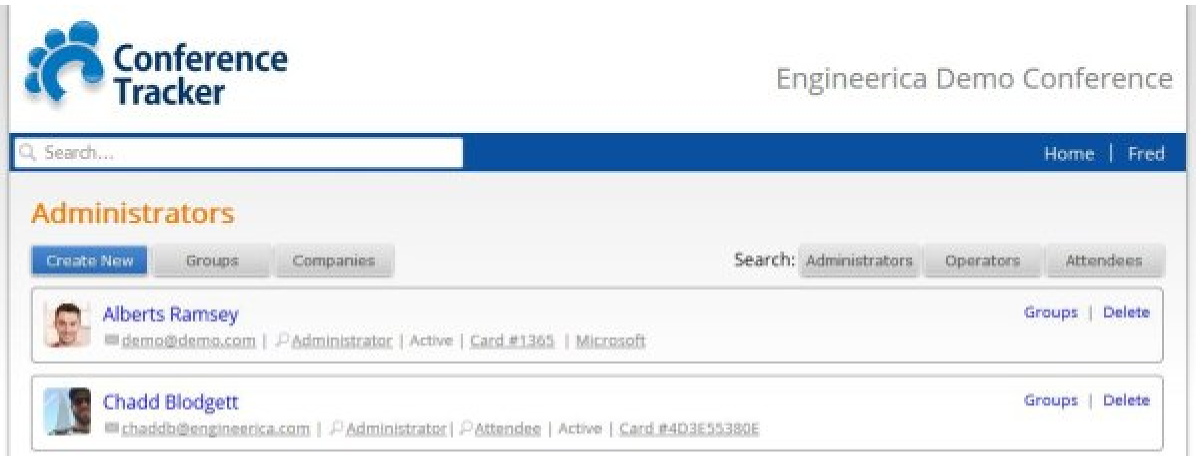
1. On the main Maps page, look for the map you would like to delete. On the far right end, there will be two dots. Clicking on these two dots will give you the option to delete this map.
2. On the main Maps page, click on the map you would like to delete. Once the new page has loaded, you can see a red Delete button towards the top of the page. Clicking this will also delete the map.

Administrators

How to Access: From the **Home** screen click on the **Administrators** link under the **Conference** section.

This is where you can manage your **Administrators** information.

Users with the **Administrator** role have access to all features of **Conference Tracker**, **Conference Attendee**, and **Conference Leads**.



Create: Simply click the **Create New** button at the top of this screen.

Edit: Click on the name of the Administrator you would like to edit.

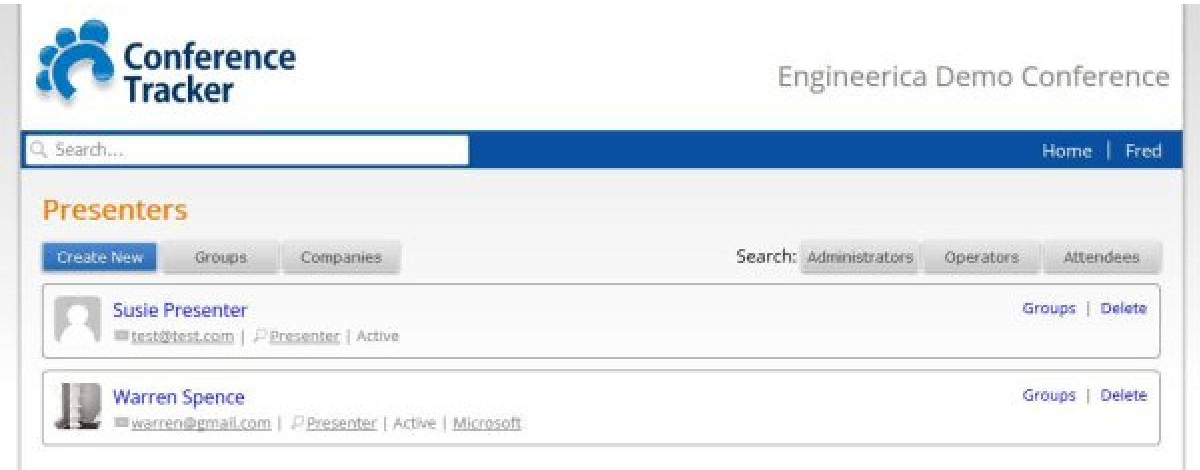
Delete: Click the **Delete** link on the far right side of the bar. Then click the **OK** button to confirm.

If you accidentally clicked the **Delete** link click the **Cancel** button to go back.

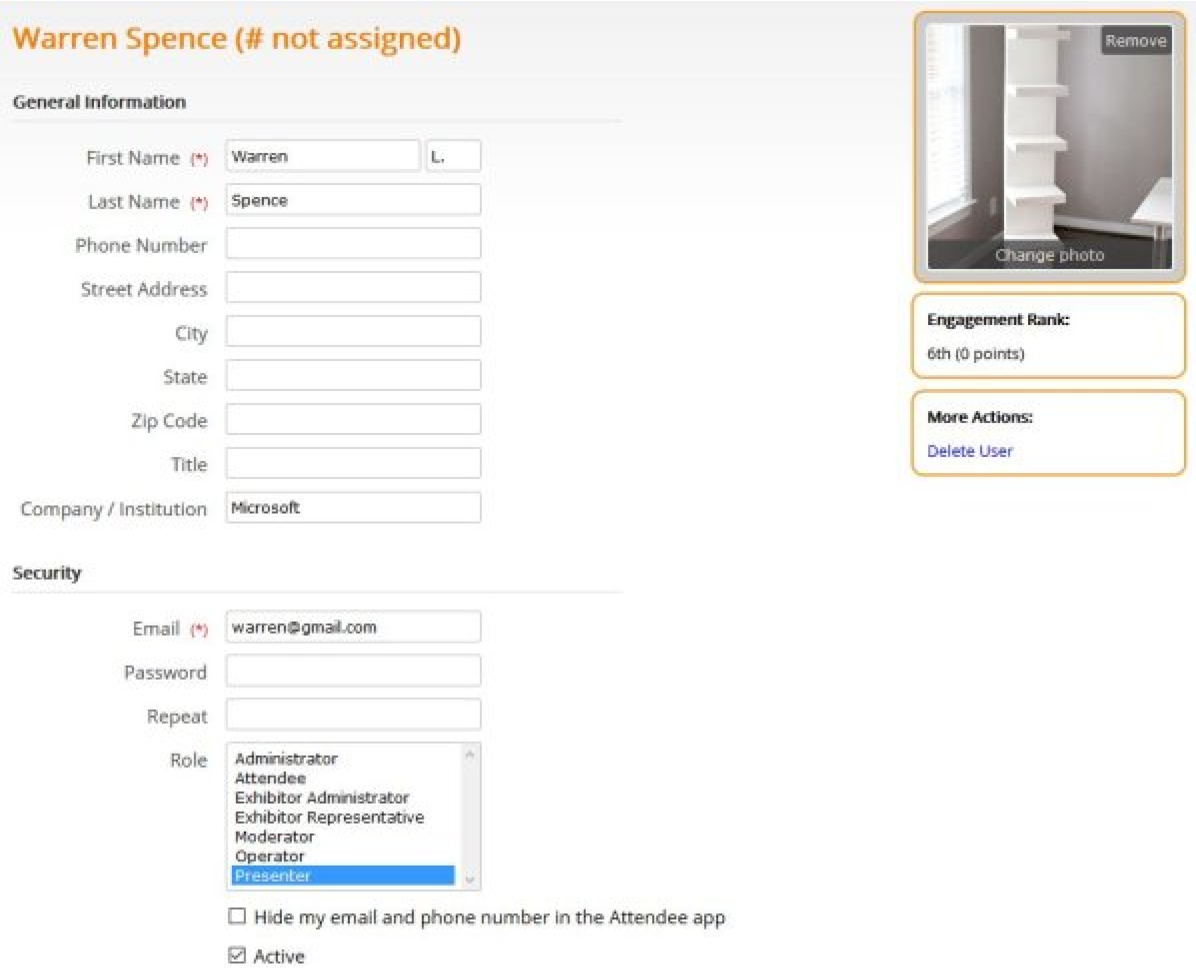
Presenters

Click on **Presenters** under **Conference** to access the Presenters section. This is where you can create new users or quickly view/edit the users in the system. You can make them **Administrators**, **Operators**, **Moderators**, **Exhibitors**, **Presenters**, or regular **Attendees**.

Users with the **Presenter** role have no special ability other than being able to be assigned to a session, which will allow them to appear under the Presenter's list on the **Attendee** app.



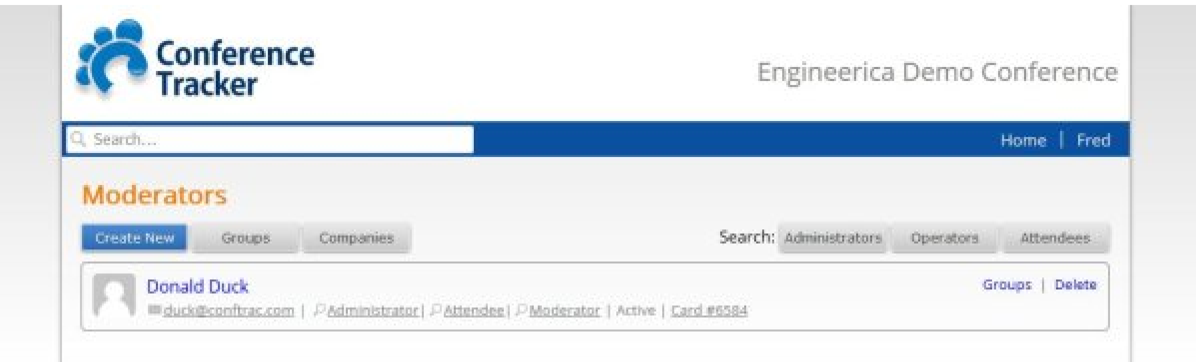
You can click on the **Administrators**, **Operators**, **Moderators**, **Exhibitors**, **Presenters**, or **Attendees** buttons to show that group of users. Once you have selected the group you want to view just click on the name of a user you want to edit.



From this screen you can **change** the person's **First Name**, **Last Name**, **Email**, **Password**, **Repeat** (this is the password typed again), or **Role**. Most of the time you will visit this screen to manage the person's **Role** or **password** but you can enter corrections as well.

Moderators

This is where you can manage your **Moderator** information.



Users with the **Moderator** role have the ability to moderate the posts on the **Attendee** app. They can delete posts made on the app, as well as upload and make changes to the Map.

Create: Simply click the **Create New** button at the top of this screen.

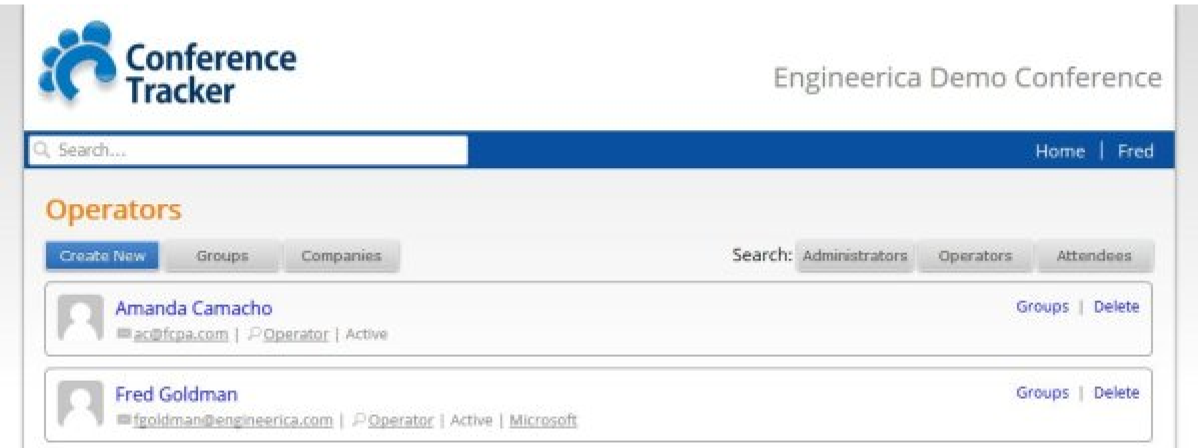
Edit: Click on the name of the Moderator you would like to edit.

Delete: Click the **Delete** link on the far right side of the bar. Then click the **OK** button to confirm.

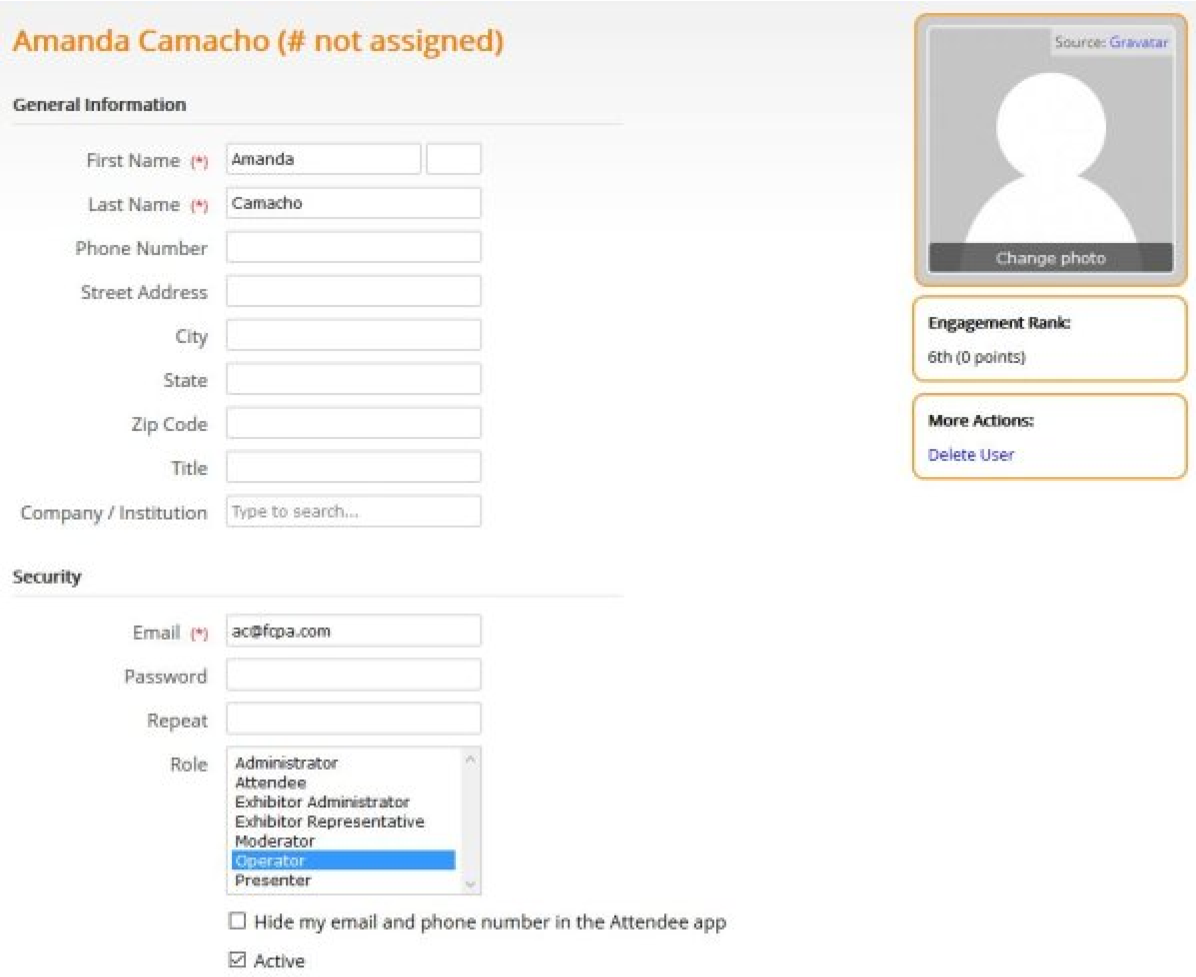
Device Operators

Click on **Device Operators** under **Conference** to access the operator section. This is where you can create new users or quickly view/edit the users in the system. You can make them **Administrators**, **Operators**, **Moderators**, **Exhibitors**, **Presenters**, or regular **Attendees**.

Users with the **Operator** role have the ability to log into the **Conference Tracker** app to scan attendees.



You can click on the **Administrators**, **Operators**, **Exhibitors**, **Moderators**, **Presenters**, or **Attendees** buttons to show that group of users. Once you have selected the group you want to view just click on the name of a user you want to edit.



From this screen you can **change** the person's **First Name**, **Last Name**, **Email**, **Password**, **Repeat** (this is the password typed again), or **Role**. Most of the time you will visit this screen to manage the person's **Role** or **password** but you can enter corrections as well.

Back to Guide | Previous: Getting Started | Next: Attendees