Conference

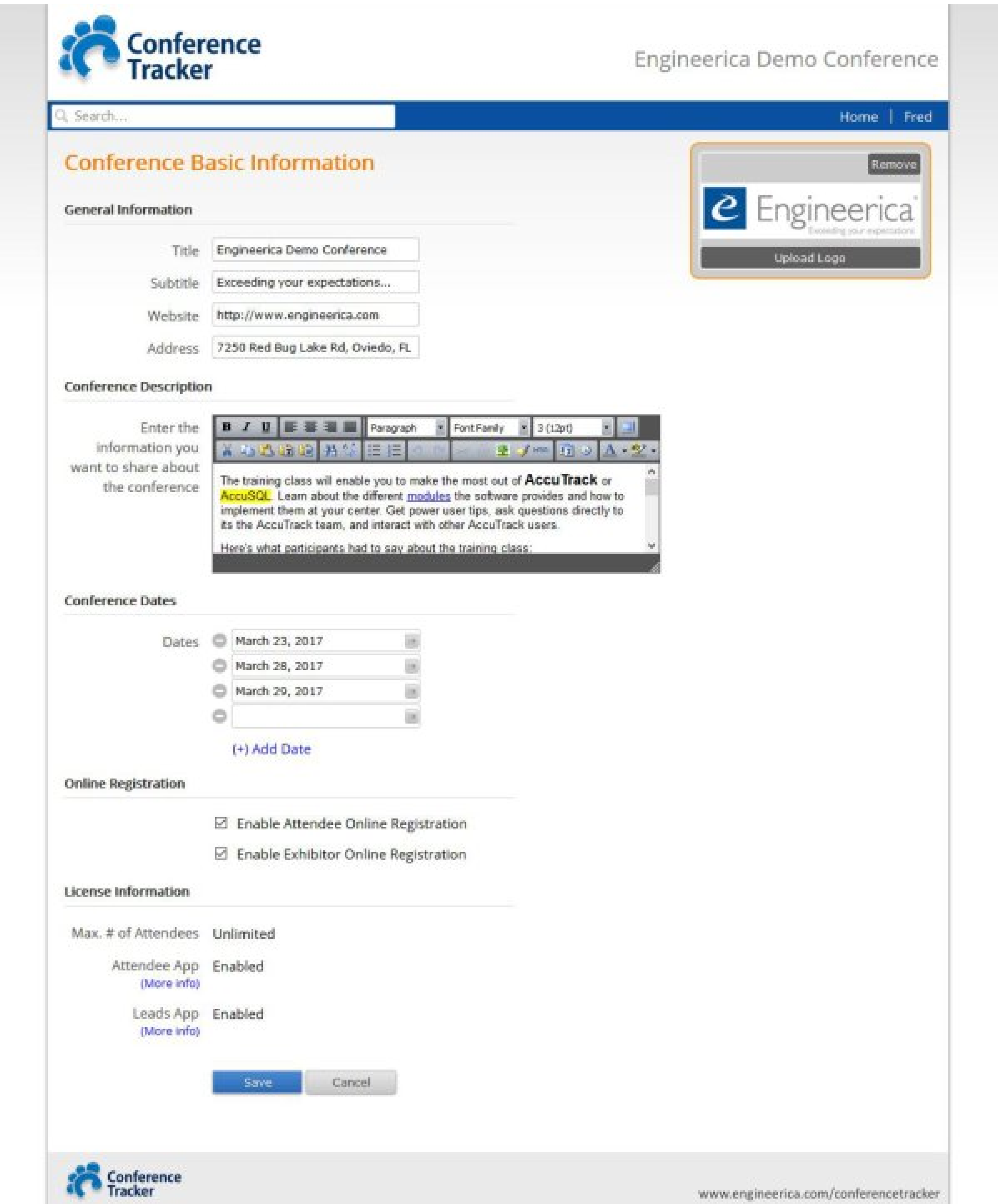
This **Conference** section allows you to configure the following information:

- **Basic Info** - 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**.
- **View/Edit 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.
- **Check-in 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.
- **Gallery** - This section allows you to display a slideshow on your browser of the pictures uploaded to the **Attendee** app.
- **Device Operators | Presenters | Moderators | Administrators** - 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.

Basic Info

The **Basic Info** 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.
- **Website**: Add the conference or organizations website that will appear in the app for guests.
- **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.
- **Conference Description**: Write a description for your conference. This will be displayed in the Info section of the **Attendee** app.
- **Conference Dates**: Set up 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.
- **Conference Logo**: Upload a Conference Logo that will be used in the App for Attendees.

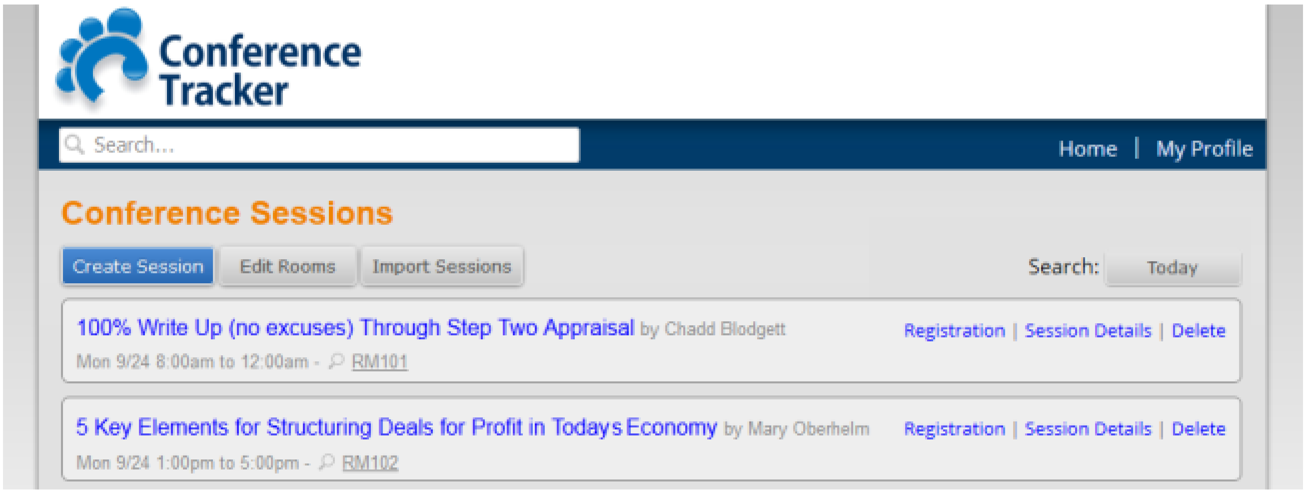


- **Enable Attendee Registration** Check this box to enable Conference Registration. This feature also offers the ability to accept Credit Card or PayPal payments using your own PayPal account through the registration process.
- **Enable Exhibitor Registration** Check this box to enable Exhibitor Registration. This feature now offers the ability to register all Exhibitors at once and collect their payment through PayPal.
- **Upload Logo:** Choose a file from your computer to use as this conferences logo.
- **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.

View/Edit Sessions

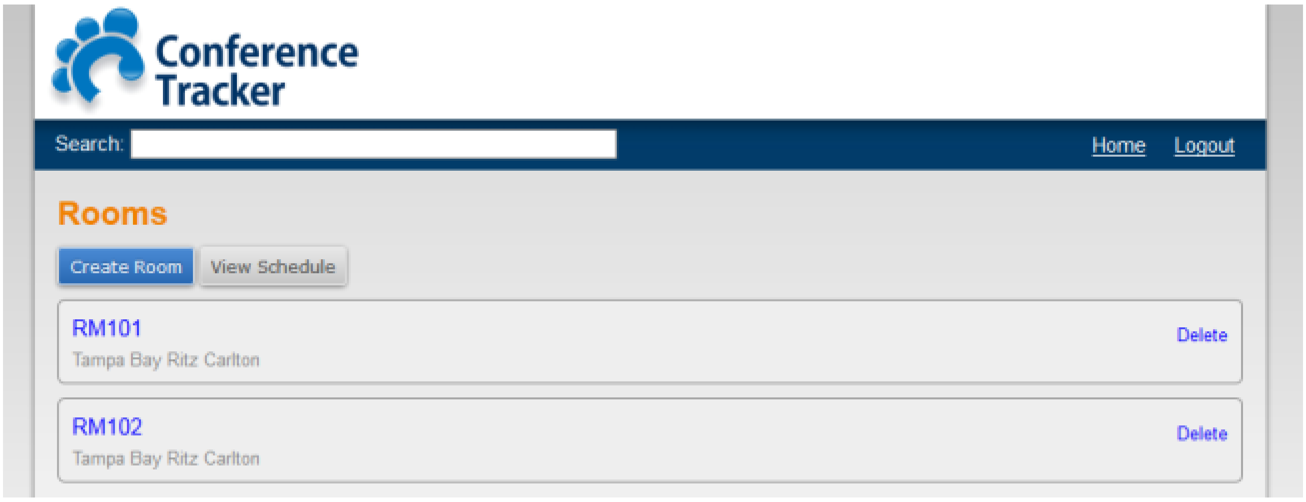
This is the section where you can create or import your workshops and session, as well as add rooms.



You must create your rooms by clicking the **Edit Rooms** button prior to being able to import your sessions/workshops. If you do not, the import will fail every time.

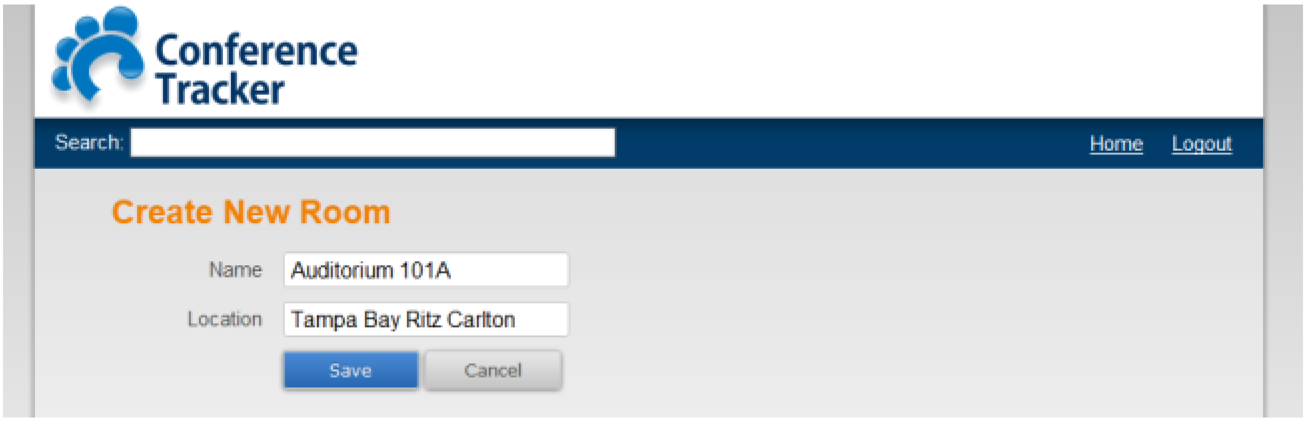
Edit Rooms

From the Conference Sessions screen if you click on the **Edit Rooms** button this screen is 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 Room** button. The **View Schedule** button will take you back to the **Conference Sessions** screen.



Create Room

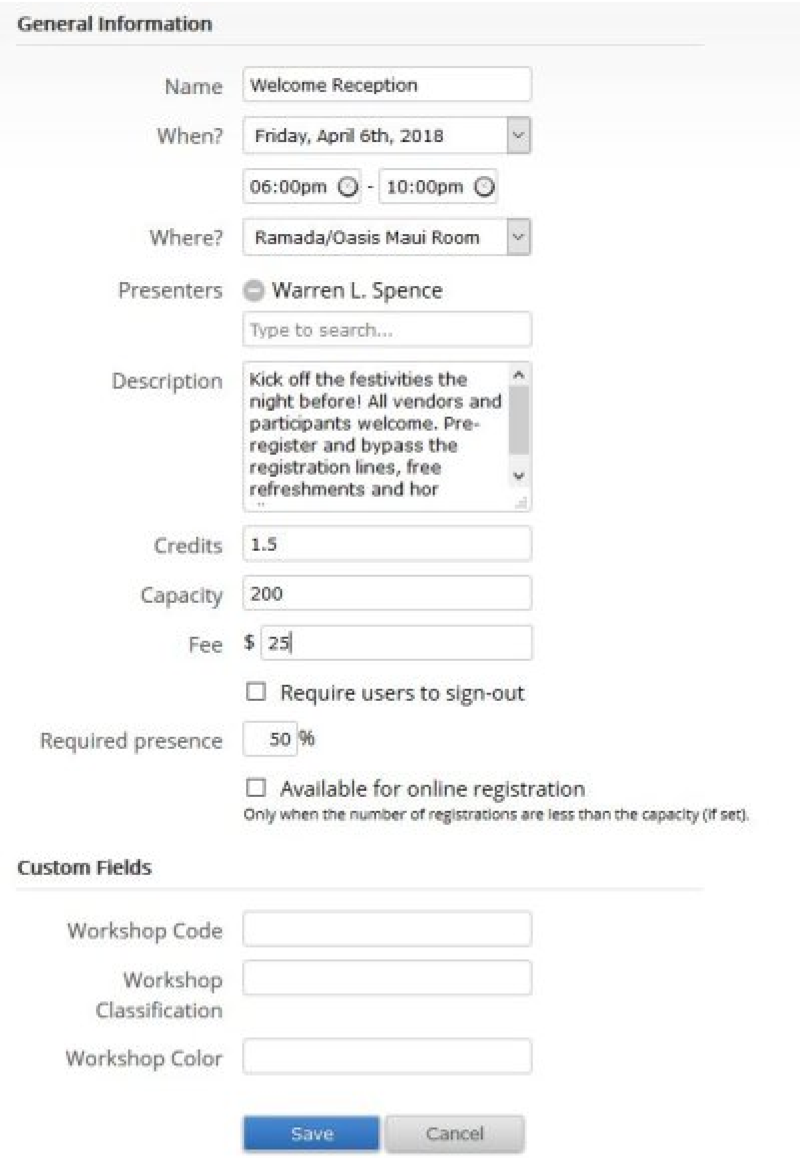
Clicking on the **Create Room** button on the **Edit Rooms** screen will take you to this page. To create a new room, simply fill in the **name** and **location** of the room.



Create Workshop/Session

Once you have the rooms entered in the **Conference Tracker** system, you are ready to either create your sessions/workshops manually or import them.

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



General Information

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

When? - This is the date of this workshop. Select from the available dates in the drop-down menu and then select the Start time/End time of the workshop. ***Note:*** *To add additional dates visit the* ***Basic Info*** *section on the* ***Home*** *screen under the* ***Conference*** *heading.*

Where? - This is the **Room** that this workshop will take place. Select from the available **Rooms** in the drop-down menu. ***Note:*** *To add additional* ***Rooms*** *go back to the* ***View/Edit Schedule*** *section on the* ***Home*** *screen under the* ***Conference*** *heading.*

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

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

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

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.

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

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

Note: *Even if you do not require them to sign-out it will require you place a 1 in the **Required Presence** field.*

Required Presence - This is the percentage of time they must have been signed in for to obtain the credits for this **workshop/session**.

Available for online registration - Uncheck this box if you do not want Attendees to see this **workshop/session** on the Online Registration form.

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.

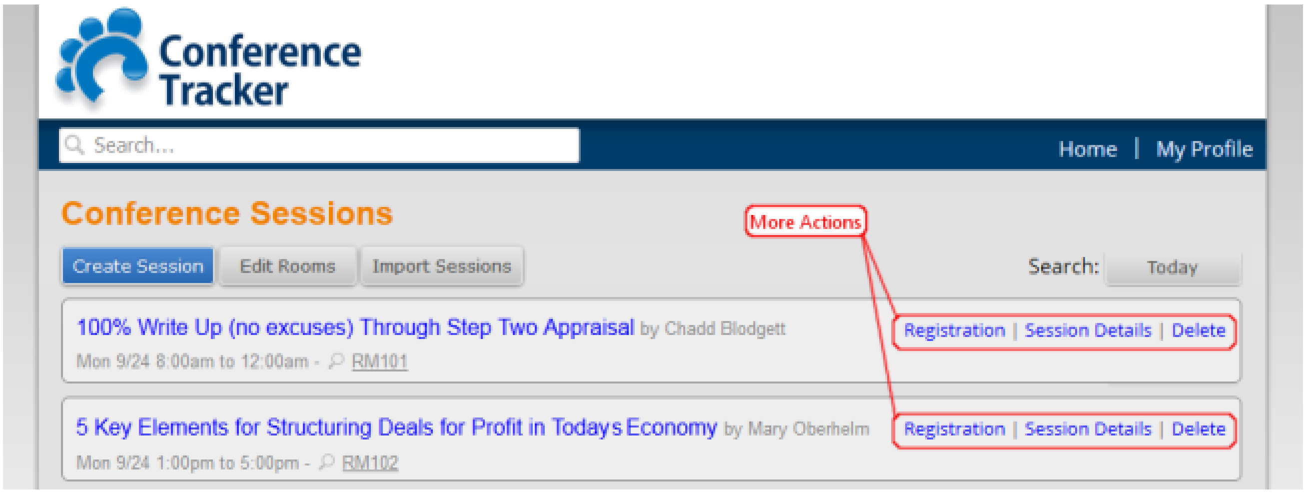
Edit Sessions

To edit a **Session/Workshop** simple click on it's title in the list of workshops when you are in the ***Conference > View Edit Sessions*** section.

Another option if there are too many **Sessions** to simply scroll through and click on the **Session Title** is to utilize the **Search:** feature at the top of any page in **Conference Tracker**.

More Actions

When looking at the list of **Sessions/Workshops** in **Conference Tracker** on the far right-side of each one listed there are 3 options.



Here is the explanation of each of those options:

- **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.

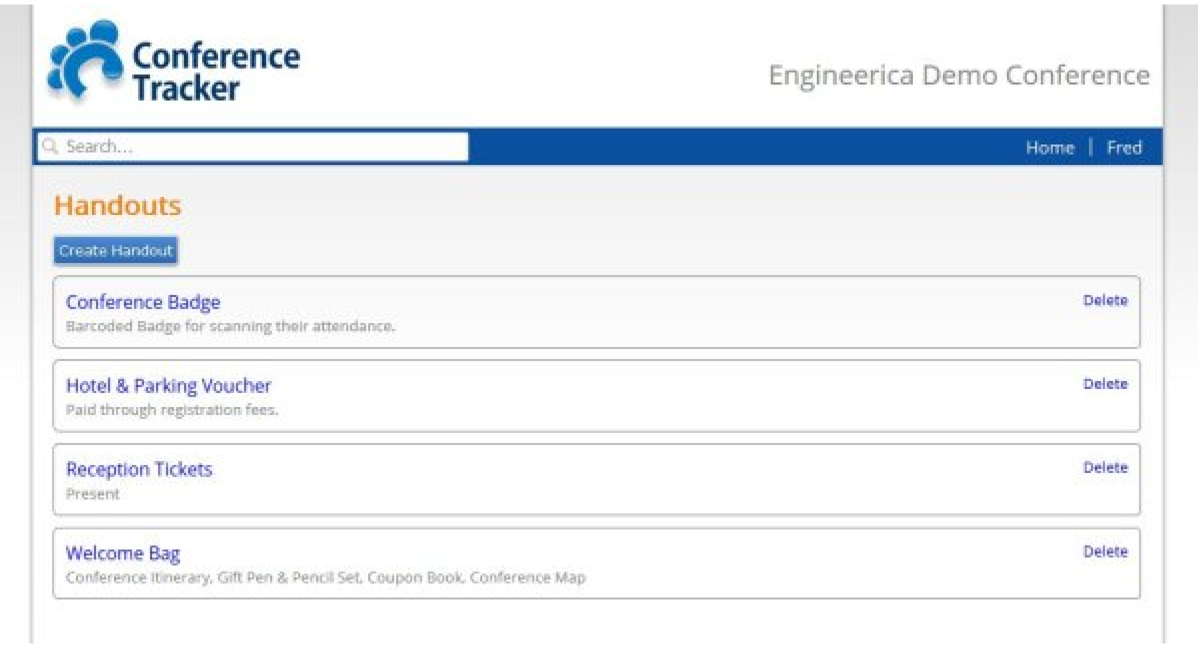
If you delete the **Workshop/Session** all settings will be deleted with it so this is not recommended unless you are canceling the **Session** or it was an extra **Session** created. You can still pull the **Attendance Logs** and **Attendance Logs (detailed) Exports** of those who have previously attended this session as these logs will remain in the system. However, if you try to recreate a **Session** with the exact same name as a Session that had been previously deleted, **Conference Tracker** will treat it is a new instance of this session, and the **Session Details Reports** will not show any previous data.

Import Sessions

If you already have an existing MS Excel Spreadsheet (XLS or XLSX) and would like to simply adjust the file to meet our import requirements. You can learn more about how the **Workshop/Session** import process works in our recently updated **Conference Tracker - Session/Workshops Import** section.

Check-in Handouts

In this section you create items that folks will complete or pickup during the **Check-In** process.



Create Handout

It's as simple as doing the following from this section:

1. Click the **Create Handout** button at the top of this page.
2. Now give a name to the **Handout** or **Activity** that they are collecting/doing at **Check-in**.
3. You can optionally give a description if needed.
4. Click the **Save** button at the bottom of the screen to save the **Handout**.

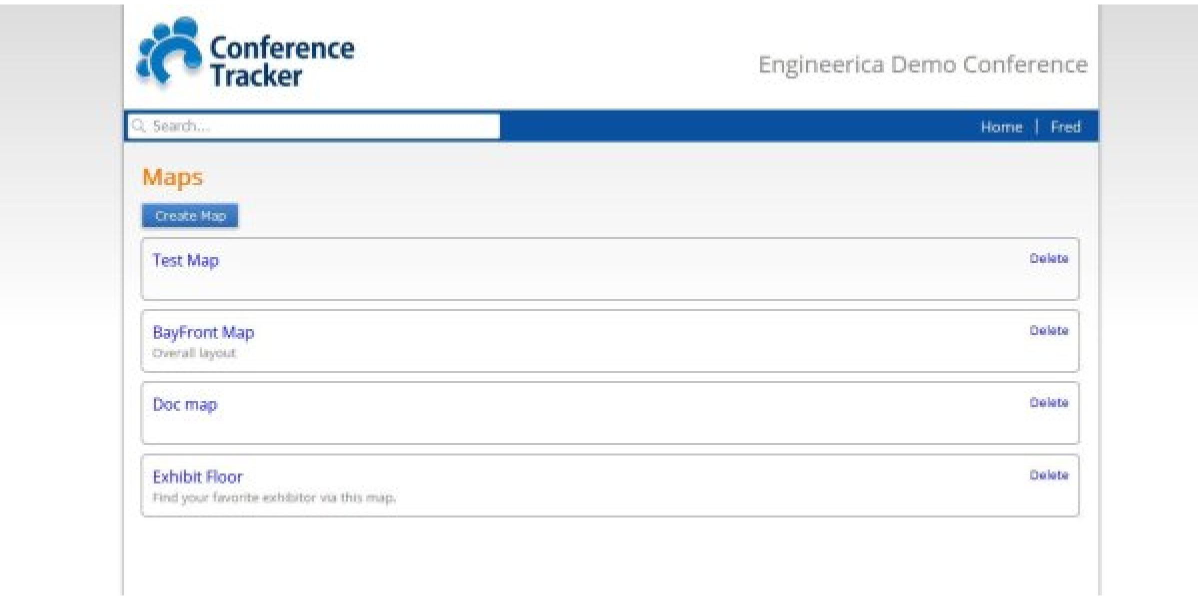
Delete Handout

When in this section you'll see a list of available **Handouts** that your conference will be giving out. If for some reason you are not going to be offering one of these items anymore or for whatever reason you want to get rid of all the tracking data for one of these items listed then click the **Delete** link on the far right-side of the listing you want to remove.

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 Map** button on the top left of this page. Then follow these steps:

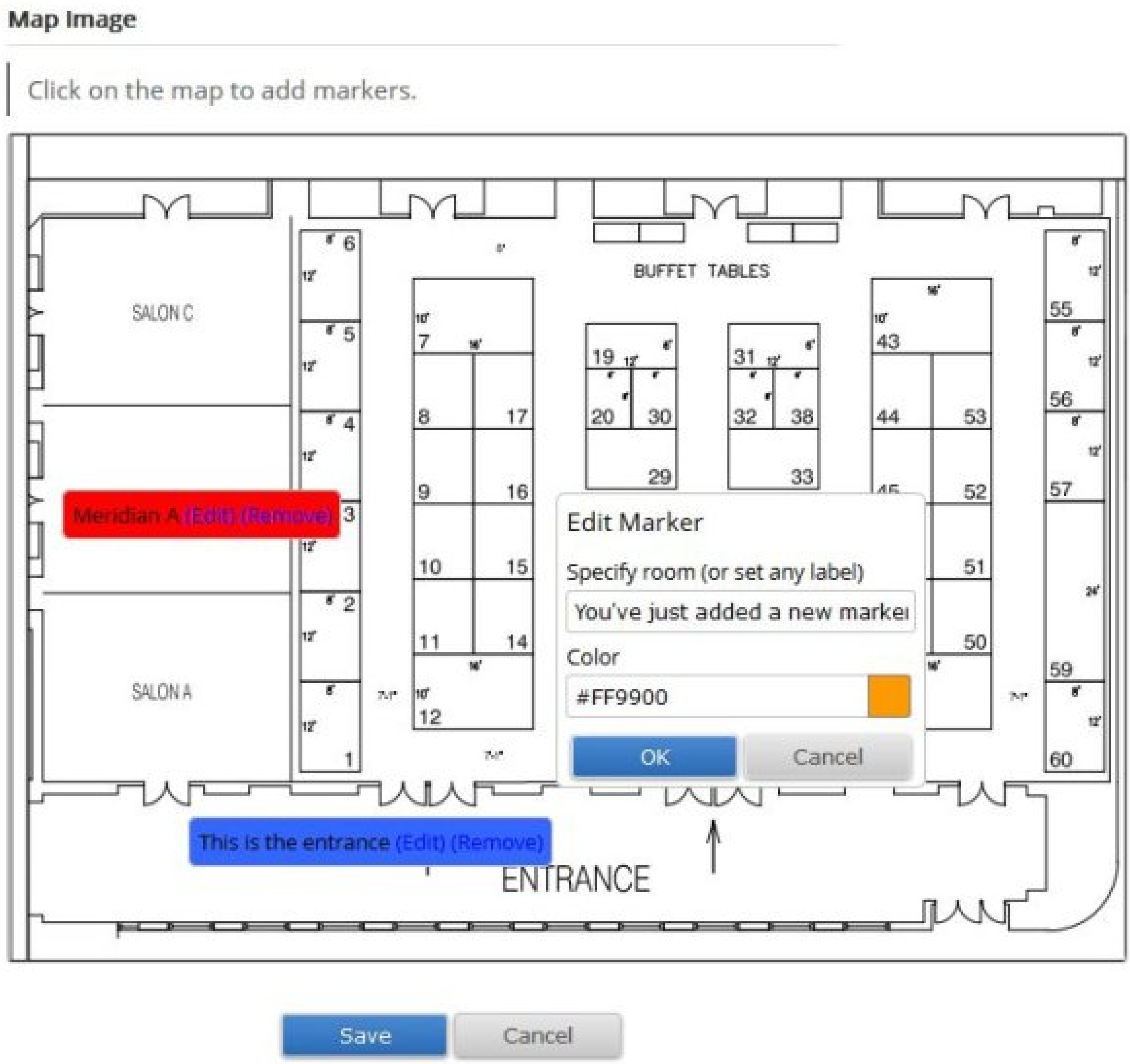
1. Enter a name for the map. This will be displayed on the Attendee app for your attendees to see.
2. Optionally, you can enter a description for the map.
3. Upload a file to be used as the map. You can upload standard image file types (such as .jpg or .png) and even PDFs.
4. Click the **Save** button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

Delete a Map

To delete a map, return to the **Maps** page. From here, you should see your list of available maps. Simply click on the **Delete** button on the right side of the map you want removed to delete it.

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.
2. Click on **Edit** to change the properties of the marker.
3. You can change the name of the marker by changing the text under **Specify Room(or set any label)**.
4. You can change the color of the marker by entering your own hexadecimal code or by clicking on the white square to the right of the textbox to choose from a preset of available 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. You can also edit markers any time you would like by simply clicking on **Edit** on the specific marker you want to change.

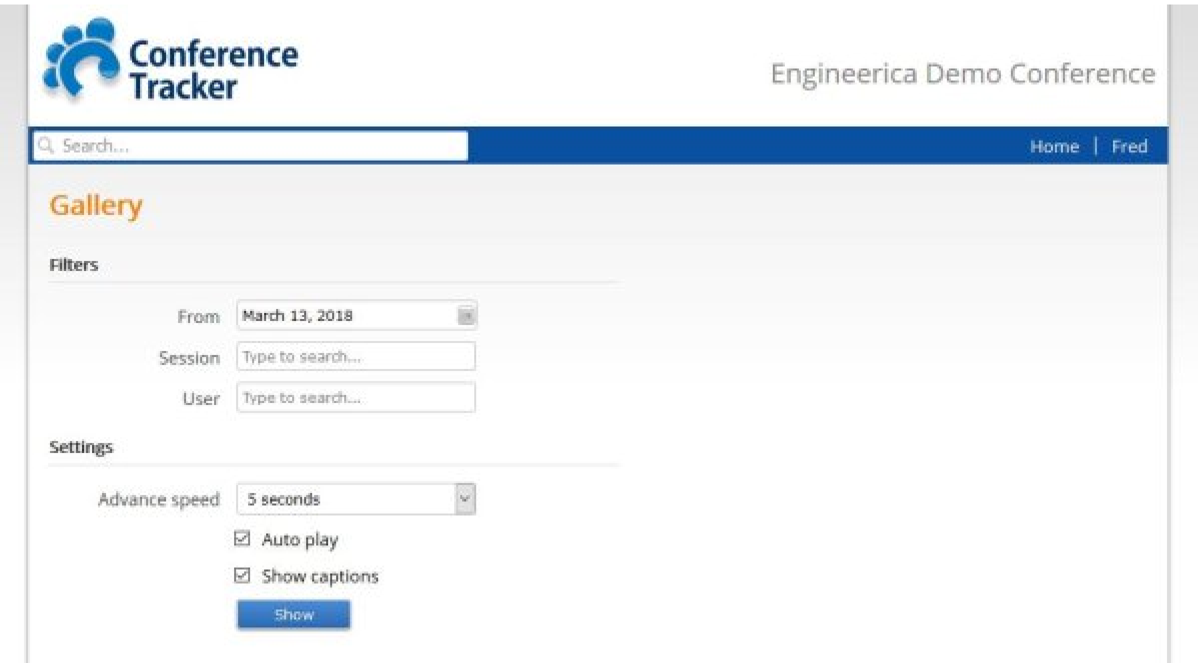
To remove a marker, click on **Remove** next to the **Edit** button on any marker.

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

If you need to go back to the Conference Attendee Checklist, click here to go back.

Gallery

With this option, you'll be able to display a slideshow of the pictures that were uploaded to the **Attendee** app. The slideshow will display on your computer screen, but it is recommended that you project your screen on a wall or to a larger display at your event.



Filters

You have the choice of filtering the slideshow photos by **Date**, **Session**, and **User**. Adjusting the **Date** filter will only display photos after the date selected. Adjusting the **Session** filter will only display photos in the session selected. Adjusting the **User** filter will only display photos submitted by the selected user. You can use these filters individually or in combination with each other.

Settings

You can change the speed at which the pictures change using the **Advance Speed** drop down menu. You can select a range of times between 5 seconds to 1 minute.

Enabling **Auto Play** will have the slideshow advance on its own. Leaving it unchecked will allow you to manually change the pictures yourself.

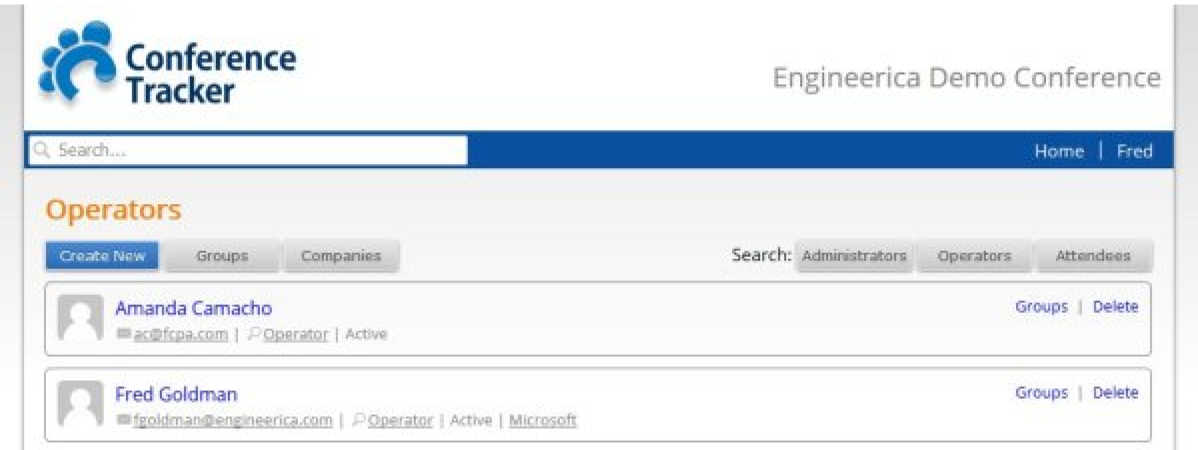
Enabling **Show Captions** will display in the bottom left corner of each picture the name, profile picture, and comment of the user who submitted the picture. Leaving it unchecked removes it.

Device Operators

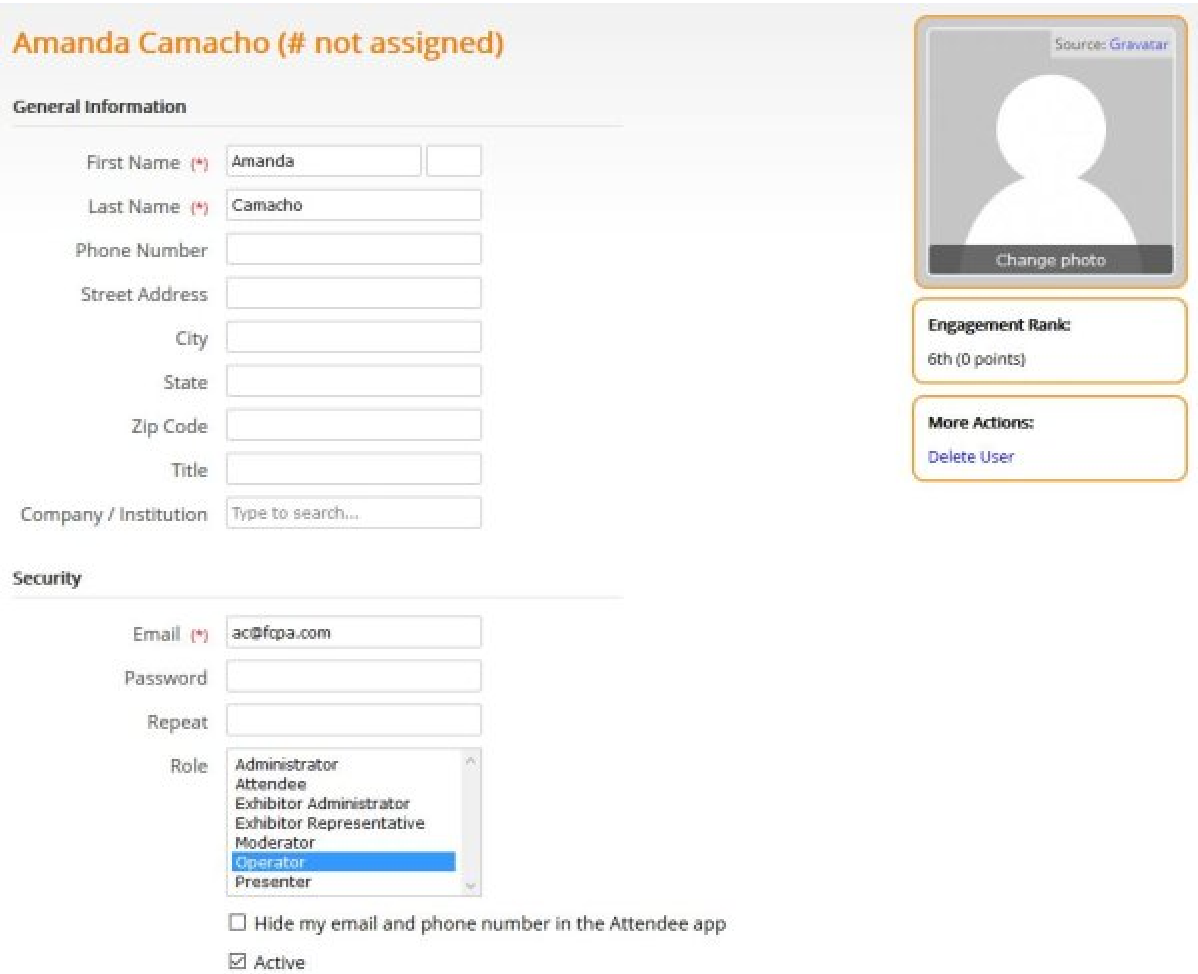
Click on **Device Operators** under **Conference** to access the operator section. This is where you can create new users or quickly view/edit the users in the system. You can make them **Administrators**,

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.

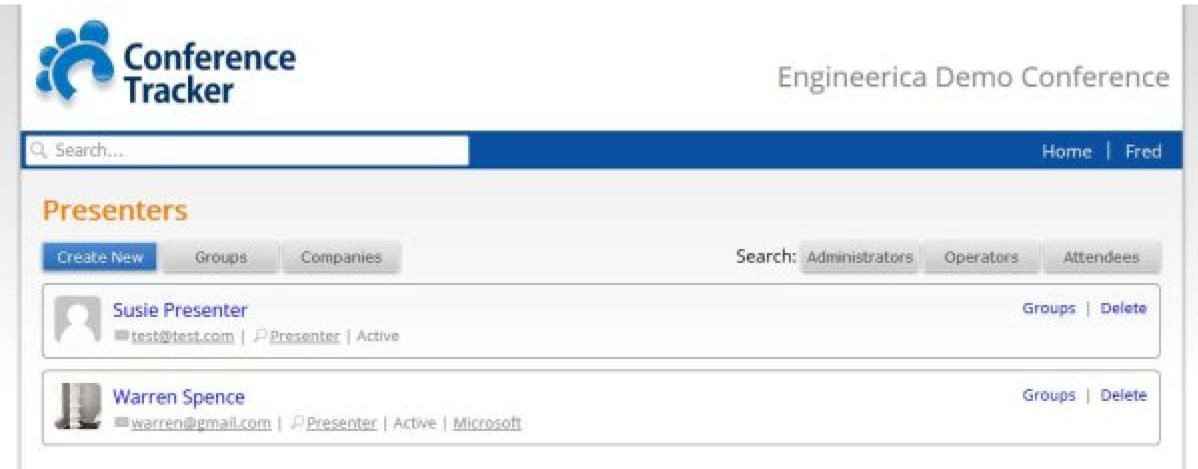


From this screen you can **change** the person's **First Name**, **Last Name**, **Email**, **Password**, **Repeat** (this is the password typed again), or **Role**. Most of the time you will visit this screen to manage the person's **Role** or **password** but you can enter corrections as well.

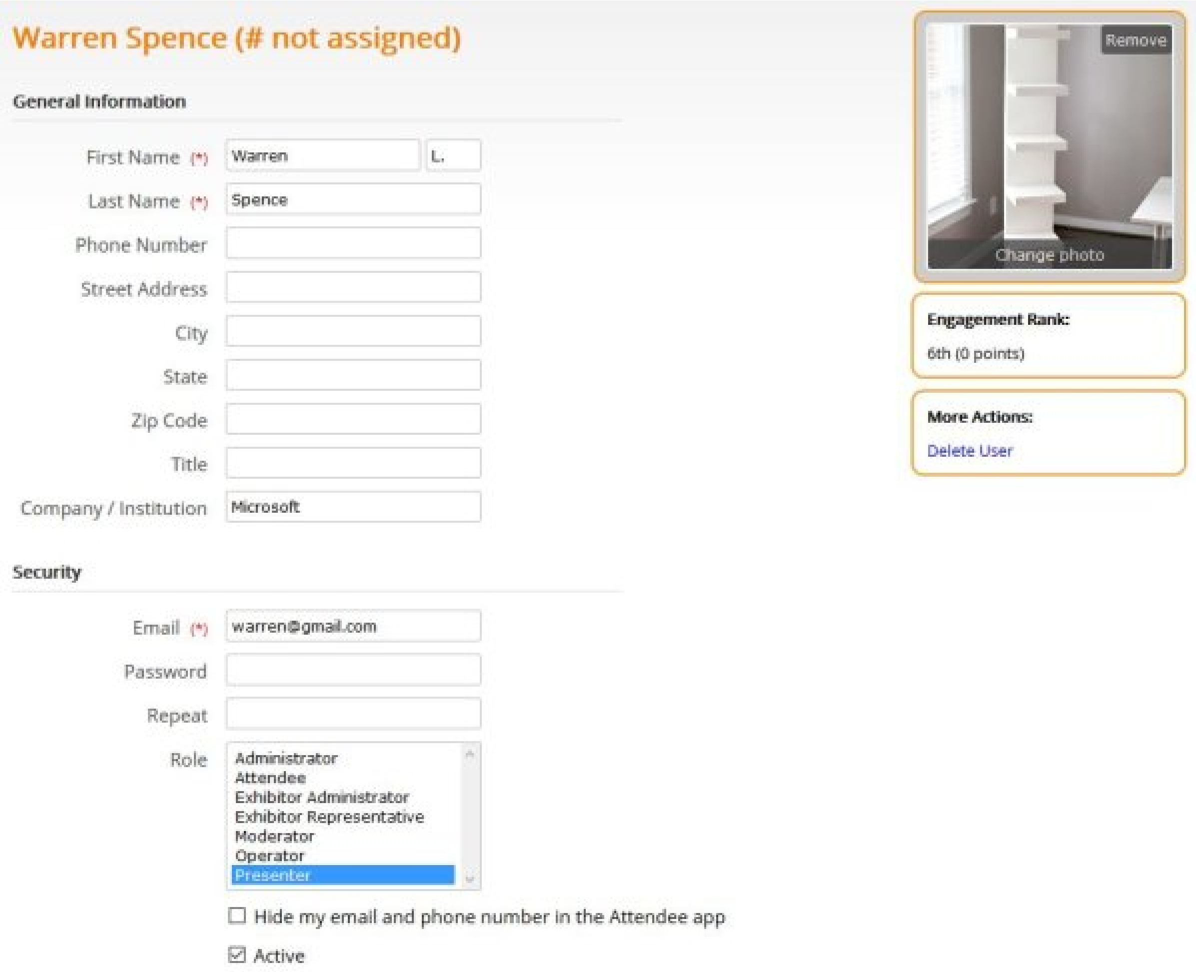
Presenters

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.



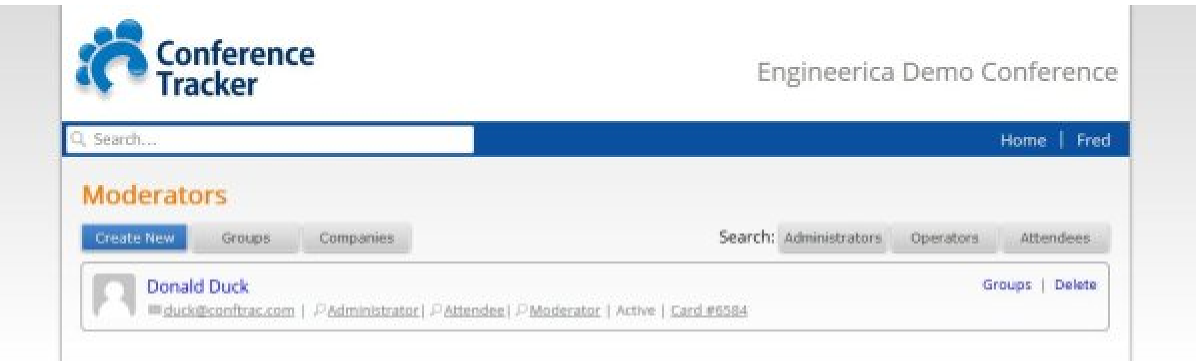
You can click on the **Administrators**, **Operators**, **Moderators**, **Exhibitors**, **Presenters**, or **Attendees** buttons to show that group of users. Once you have selected the group you want to view just click on the name of a user you want to edit.



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.

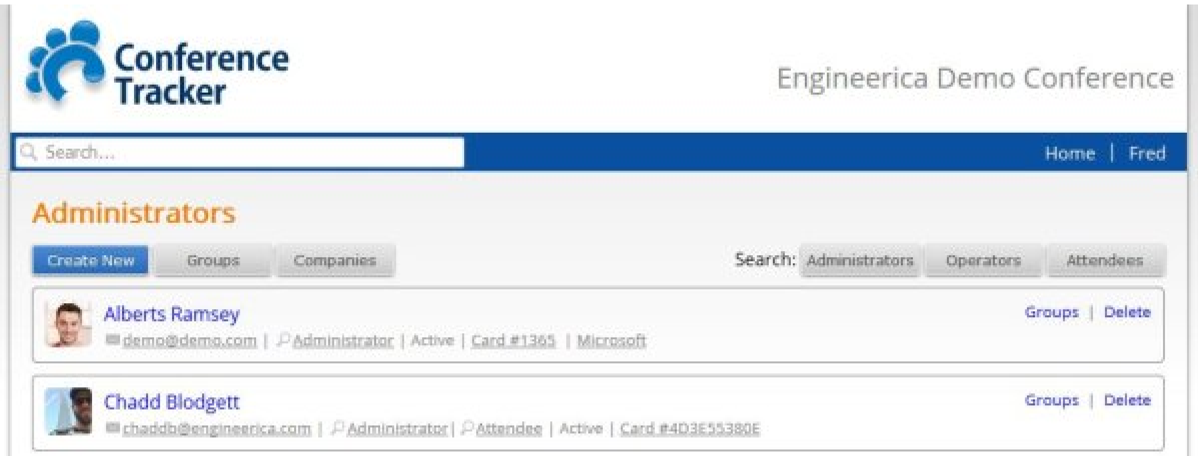
Delete: Click the **Delete** link on the far right side of the bar. Then click the **OK** button to confirm.

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.

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