ConferenceBrain

ConferenceBrain Documentation

Introduction

ConferenceBrain combines the functionality of an Association Membership System with a robust Conference Management Platform to create an ideal solution for member-based organizations which conduct live learning events.

Definitions

The following terms have specific meaning in this documentation. They will be capitalized when the documentation refers to this specific meaning.

Account: The record of information, including email and password, of a single individual as stored in ConferenceBrain. Any individual who logs into ConferenceBrain needs a unique account.

Admin: An individual authorized by Client to access the Back End of their ConferenceBrain installation.

Attendee: Individuals who have attended past Conferences or are registered to attend future Conferences. Attendees may or may not be Members.

Back End (BE): The parts of ConferenceBrain which are accessible only to the Client. For example, the Edit Web Page interface is part of the Back End of ConferenceBrain.

Client: The company, individual or other entity which licenses the use of ConferenceBrain.

Conference: A live educational event run by Client.

Exhibitor: Companies who purchase exhibit space at the Conference.

Faculty: Individuals who are retained by the Client as educators for the Conference.

Front End (FE): The parts of ConferenceBrain which are accessible to website visitors both with and without a password. For example, the Create Account form is part of the Front End of ConferenceBrain.

Group: A way for Clients to allow a User’s account to be recognized as apart of a Committee

Member: Individuals who pay membership dues to Client.

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Profile: The expanded set of information provided by Members when they sign up as members. Profiles are linked to Accounts. Each Account can only have a single Profile.

Sponsor: Companies who provide financial support to the Client.

User: Any person who not an Admin and is viewing the Front End of ConferenceBrain while logged in.

Visitor: Any person who is viewing the Front End of ConferenceBrain without logging in.

The Account System

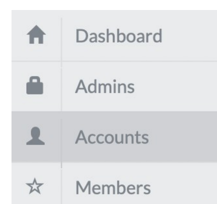
There are two types of accounts in ConferenceBrain: User accounts and Admin accounts.

User accounts enable Visitors to access account specific features like registering for a Conference or submitting an abstract.

Admin accounts allow ConferenceBrain Clients to access the Back End specific features like changing copy on the website/app or creating new events for User accounts to register for.

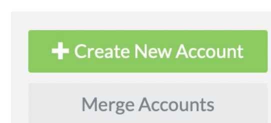
Create a User account

Visitors can create a new User account by selecting the R**egister** link, often found in the upper right corner of the screen.



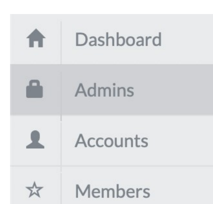
Admins can also create a new User account using the following procedure.

- Log into the Back End using and Admin account.
- Select **Accounts** from the left column menu.
- Select the **Create New Account** button and enter the required information.



Create an Admin account

An Admin account will be created for the Client upon site creation. Admins can create other Admin accounts, using the following procedure.



- Log into the Back End using and Admin account.
- Select **Admins** from the left column menu

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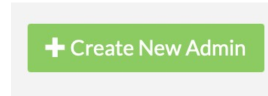
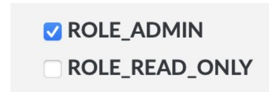
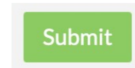
- Click the **Create New Admin** button and enter the required information.



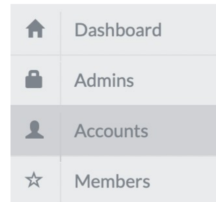
- Admin accounts can be assigned to a “view only” version by utilizing the **Role_Read_Only** option, or have full access to edit by marking **Role_Admin**.



- Select the **Submit** button.

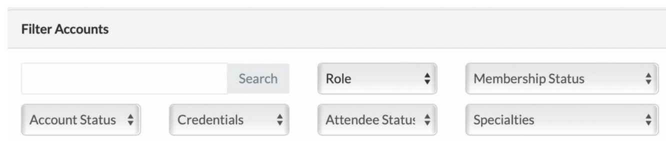


Edit a User account

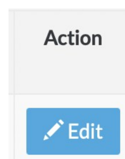


Admins can edit a User account using the following procedure.

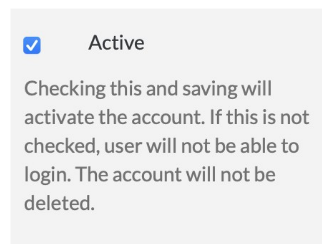
- Log into the Back End using and Admin account.
- Select **Accounts** from the left column menu utilize the search function to locate the Account of interest.



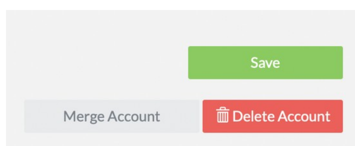
- Select the **Edit** button on the right to manually change any information pertaining to the user selected



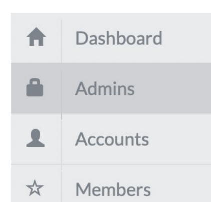
- To streamline onsite registration, Admins can check the **Active** option at the bottom of the page to skip the requirement for authentication of the email from the User.



- Select the **Save** button.



Edit an Admin account



Admin accounts with edit capabilities, can edit other Admin accounts by using the following procedure.

- Log into the Back End using an Admin account.
- Select **Admins** from the left column menu and locate the Admin account of interest in the list generated.

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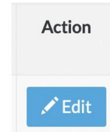
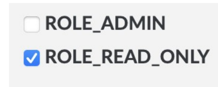
- Select the **Edit** button on the right to manually change any information pertaining to the Admin selected including reducing access to a read only format by checking the box **Role_Read_Only**.





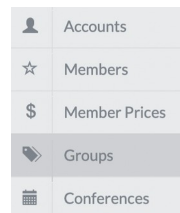
Groups/Committees

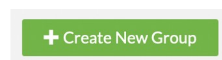
Admins can create a Group, sometimes called a committee, that Users can belong to. For example Board of Directors is a Group User accounts can choose to belong to and have displayed on their profile.

Create a new Group

Admins can create new Groups by using the following procedure.

- Log into the Back End using and Admin account.
- Select **Groups** from the left column menu.
- Select the **Create New Group** button. There you will be able to enter the name and description of active and inactive groups/committees.

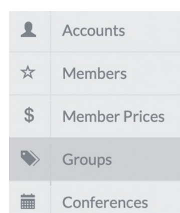


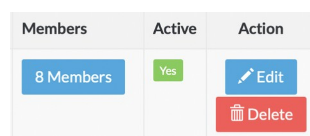


Add a Member to a Group

Admins can edit Groups information or add Members, Attendees, Faculty, or Exhibitors to existing Groups by using the following procedure.

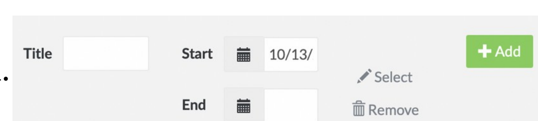
- Log into the Back End using and Admin account.
- Select **Groups** from the left column menu.
- Find the Group you wish to add to, and select **Edit**, here you can edit any information about the Group





- To add someone to the Group, select **Add Group Member** then find the Members, Attendee, Faculty, or Exhibitor you want to add.

- To add more then one person, click **Add** after finding and entering the information of one person. A new field will appear to add another person.



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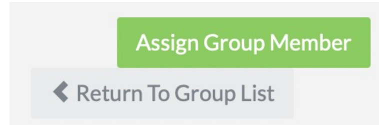
- Select **Assign Group Number** when you are ready to save your changes.

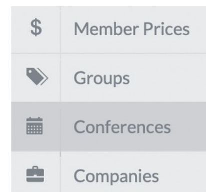


Conference System

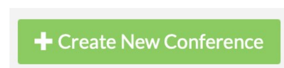
ConferenceBrain allows organizations to manage Conference data to distribute publicly or with controlled access. For example Visitors can view the Conference schedule while only Admin accounts can make changes to the content.

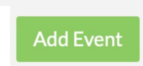
Create new Conference

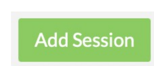
A new Conference must be created in the Back End before any User can register as an Attendee for that event. Use the following procedure to create a new Conference for the Client site.



- Log into the Back End using and Admin account.
- Select **Conferences** from the left column menu
- Select the **Create New Conference** button on the right
- There will be a series of 7 pages of question pertaining to the name, date, location, if there will be exhibitors, etc. for the Conference. Utilize the Add Event button to add extra events
- When adding speakers Admins can utilize the **Add Session** button to add spaces for more than one speaker/session.







Register as an Attendee (Users)

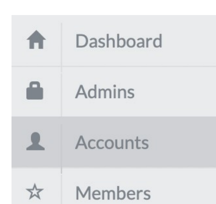
The Attendees list is specific for each conference. Visitors must have an active User account to register as an Attendee of a Conference.

Users can register for a conference on the Front End of the site by using the following procedure.

- Hover over the **Annual Symposium** tab to enable the drop down menu then select **Registration** and providing the required information.

Admin can streamline this step for Users onsite at registration desk by using the following procedure.

- Log into the Back End using and Admin account.



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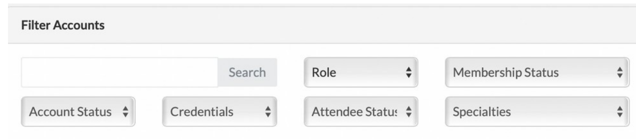
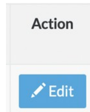
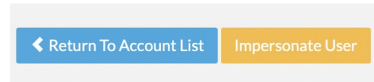
- Select **Accounts** from the left column menu, utilize the search function to locate the Account of interest.

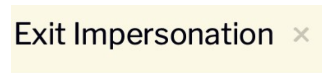




- Select the **Edit** button.
- Select the **Impersonate User** option at the bottom of the page to access the Front End of the Client site as if logged into that Users account without the requirement for the User credentials to be entered.

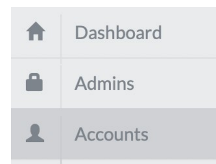


- When you are done impersonating the User return to the Back End by selecting **Exit Impersonation**

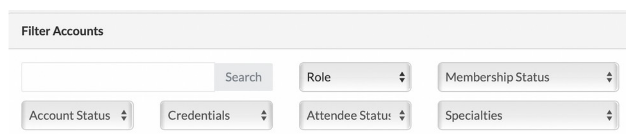


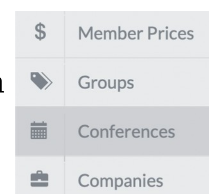
Register Users as Attendee (Admin)

Admin can view and add to an Attendee list using the following procedure.

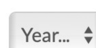


- Log into the Back End using and Admin account.
- Confirm the Visitor has an active User account by searching the **Accounts** list.
- If they do not have an active User account see *Create a User Account,* If they have a User account that is not active see *Edit a User account.* If they do not have an active User account, proceed.

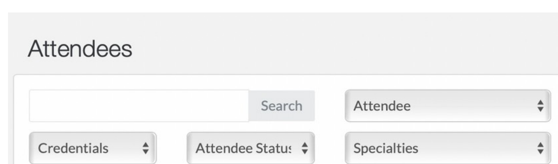




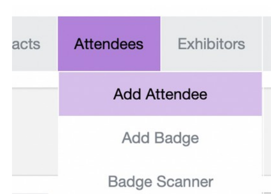
- Select **Conferences** from the left column menu, utilize the **Year** function to narrow results and then select the Conference of interest.



- Select to the **Attendees** tab on the top of the page to return a complete list of all Attendees registered for the Conference selected. Utilize the search function to be sure the new Attendee is not already registered for this Conference.



- To add a new Attendee, hover over the **Attendees** tab without selecting to activate a drop down a menu of Attendee specific actions like **Add Attendee**, **Add Badge**, etc.
- Select **Add Attendee.**



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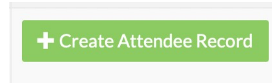
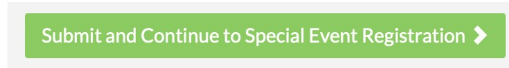
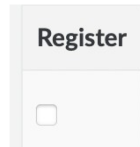
- A list of active User Accounts will be generated. Utilize the search function to locate the active User account confirmed in earlier steps.
- Select **Create Attendee Record**.



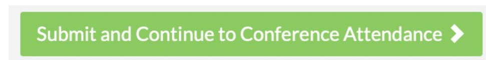
- There will be a series of registration questions regarding the account registration, once complete, select **Submit and Continue to Special Event Registration**



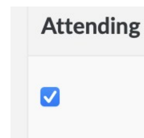
- Next there will be the option to select R**egister** for any special events such as a dinner



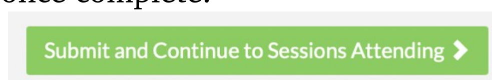
- Select **Submit and Continue to Conference Attendance** once complete.



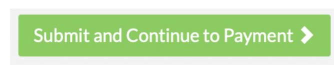
- Mark **Attending** on on conference listed



- Select **Submit and Continue to Sessions Attending** once complete.
- Mark **Attending** on the sessions they plan to attend.



- Select **Submit and Continue to Payment to** complete final portion of registration.



Exhibitors

The Exhibitors list is specific for each Conference. When a Conference is created the creator will be promoted to submit all dates pertaining to Exhibitor registration and payment.

To edit Exhibitors use the following procedure

To view or edit an exhibitors list first navigate to the Conference tab in the admin back end, then utilize the search function to narrow results and select the conference of interest. By clicking the grey Exhibitors tab on the top of the page you will return a complete list of all exhibitors registered for the conference selected. Hovering over the tab will drop down a menu of exhibitor specific actions like editing the exhibitor map.

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