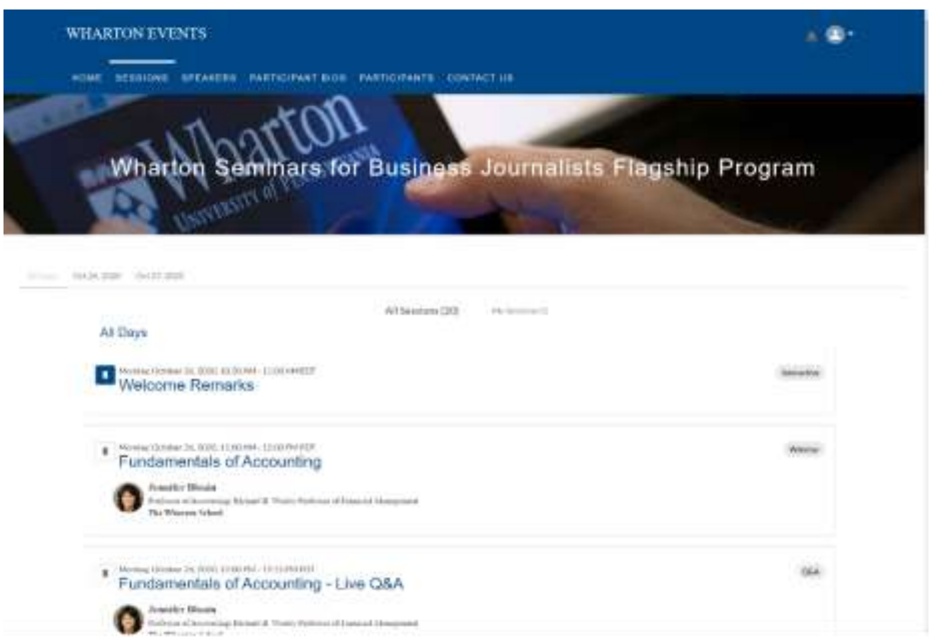
Wharton Events Portal User Guide

Table of Contents

Part One – Introduction

Introduction to the Events Portal

The Events Portal is a Salesforce-based platform created by the Marketing and Communications team, allowing users to build conferencing sites and hubs for complex events, in-person or virtual. This is a platform where your conference or complex event is **HOSTED**, live or pre-recorded.



Events Portal URL is universal for all events and users:
eventportal.wharton.upenn.edu

Part Two – Creating your Portal Event

Getting Started - Creating your Events HQ Site

The first step in building your Portal conference is to create the Events HQ event. When you have your basic Events HQ event created with the appropriate registration, please notify the Marketing and Technology team. They will enable the Portal Configuration option.

- **Need help setting up Events HQ? Check out our training guides in the [Help Center.]()**

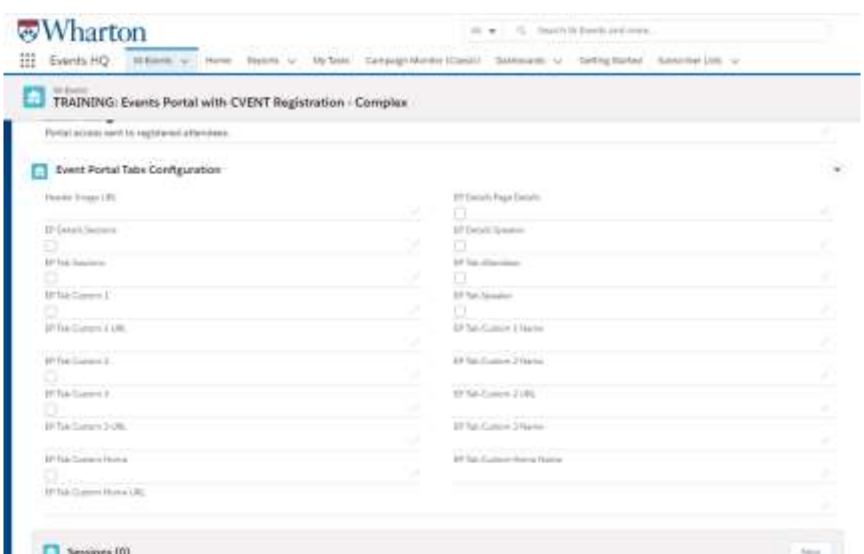
Build the Portal

Events Tabs

- **Default Event Tabs:** Start by laying out the TABS that will appear on your Portal. Pre-set options include. **Home Page (Details), Sessions Tab, Speakers Tab, Attendees Tab**, and **Chat Tabs.**
- **Custom Event Tabs:** Include up to THREE (3) Custom Tabs. You can create a custom page using your Wharton website, or bring over an existing Wharton CMS page [For CMS that need to be secure, mark the page as no-index]
- **Custom Home Page:** To create a more detailed, custom Home page, select the Custom Home Page checkbox, name you page (Home, FAQ, Etc). Build the homepage on your Wharton CMS and link the url. (Unselect EP Home Page Details if using a custom home page)

Select and Create Tabs

- Build the tabs by selecting the checkbox to enable each section.
- For custom tabs
  i. select the checkbox and enter the your desired tab name in the corresponding Field
  ii. Enter your CMS web link, followed by **/?sfembed=true** to add in custom Wharton cms sites



Event Tabs - Descriptions

- **Portal Header Image**: You have the option to create a custom header image for your event. Insert an image URL to update the header image. To add a custom header, upload a png or jpg [3000 x 450 pixels] using the Upload Custom Portal Header Image button
- **EP Home Page Details**- The default home page of your Portal event. You can select to build a custom home page
- **EP Home Page Speaker**- Display your speakers on the default home page
- **EP Tab Sessions**- Selecting this will create a separate Session tab that lists all sessions in chronological order.
- **EP Tab Attendees**- Create a tab for an attendees page where all registered attendees will appear in a list
- **EP Tab Speaker**- Selecting this will enable a speaker tab where all added speakers will appear in a list
- **EP Tab Chat**: Enable an Event Chat to display in your navigation(adds a Slack-type chat function to as a Portal TAB)
- **EP Tab Custom**: Add in up to three custom pages
- **EP Tab Home Custom:** Create a custom home page with more event-specific details. Disable the default IP Home Page Details page.

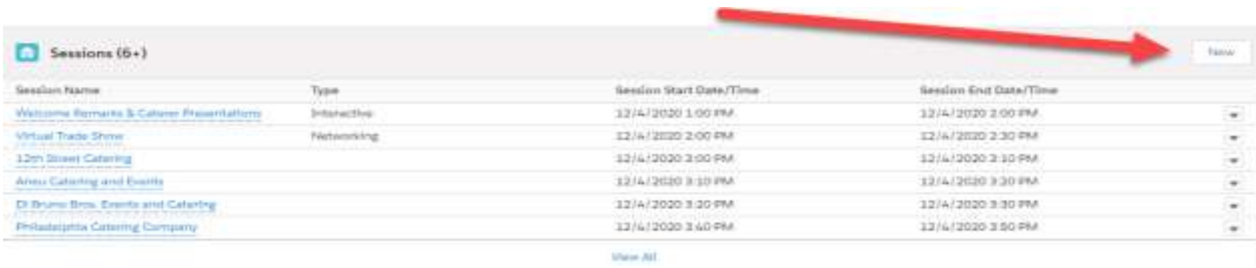
Image: Event Portal Tabs

Image: Custom Header URL

Part Three – Adding in Portal Details

Event Sessions

Now that we've turned on all of our specific tabs and custom pages for our event, we can start creating the event sessions that attendees will join throughout your event. This is similar to your event Agenda. For each session, you will add event details such as date, time, description, session type. You will also have the ability to categorize your different sessions. This is also where you will enter your presentation links– whether it's a live event hosted through a video-conferencing platform, pre-record video uploaded to YouTube, or a live steaming session directly into the Portal.



Adding New Sessions

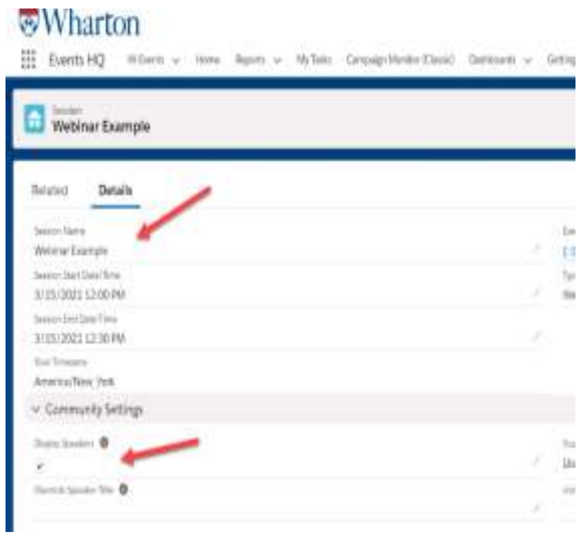
How to add Sessions: Navigate to the Sessions section. Select the "New" button on the right side of the box, and that will bring you into the detail page for each session.

Adding Sessions Details

<u>Information</u> – event specific details

- **Session Name:** Name as it will appear in the Portal
- **Session Start Date/Time:** List the date and time
- **Session Type:** We have predefined several different types of sessions. Select the one that closely defines your session.

Community Settings – How your audience views each session and interacts with others

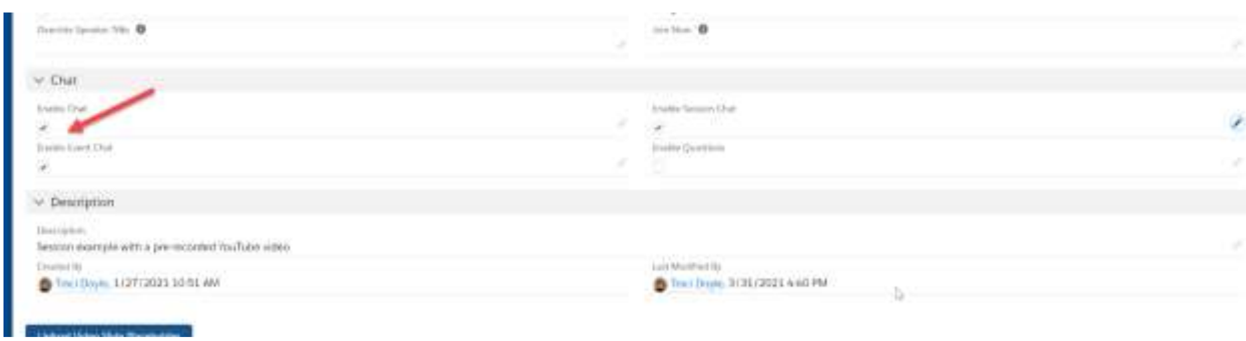


1. **Display Speakers:** Uncheck to hide the speaker panel for this session. You can rename the Speakers sectionto match each session -- Faculty, Presenters, etc.
2. **YouTube ID:** For a pre-recorded video session, upload your video to YouTube and enter your video ID. **Watch this video** (will add a link) for more instruction on how to add a pre-recorded video.
3. **Join Now:** For live sessions. Enter your video conferencing link (BlueJeans, Zoom)

Chat -- How your audience interacts with speakers and other attendees

TIP: Only enable chat for pre-recorded sessions. For live sessions (Zoom/BlueJeans), you should have your audience use those platform chat features. **See Chat section for full details on how and when to use various chat features. Note that these boxes just enable the display of chat - you will need to create the actual rooms and link them to the sessions in a different widget**

1. **Enable Chat** - Adds the chat function to a session
2. **Enable Event Chat** - Displays the larger CHAT room within a session (general event rooms)
3. **Enable Session Chat** - Displays a Session specific chat room on this session (you still need to create the session chat room). All users can view/participate.
4. **Enable Q&A -** Displays a q&A feature. Only assigned moderators can respond to questions.



Description: Add images and/or text that describe your session.

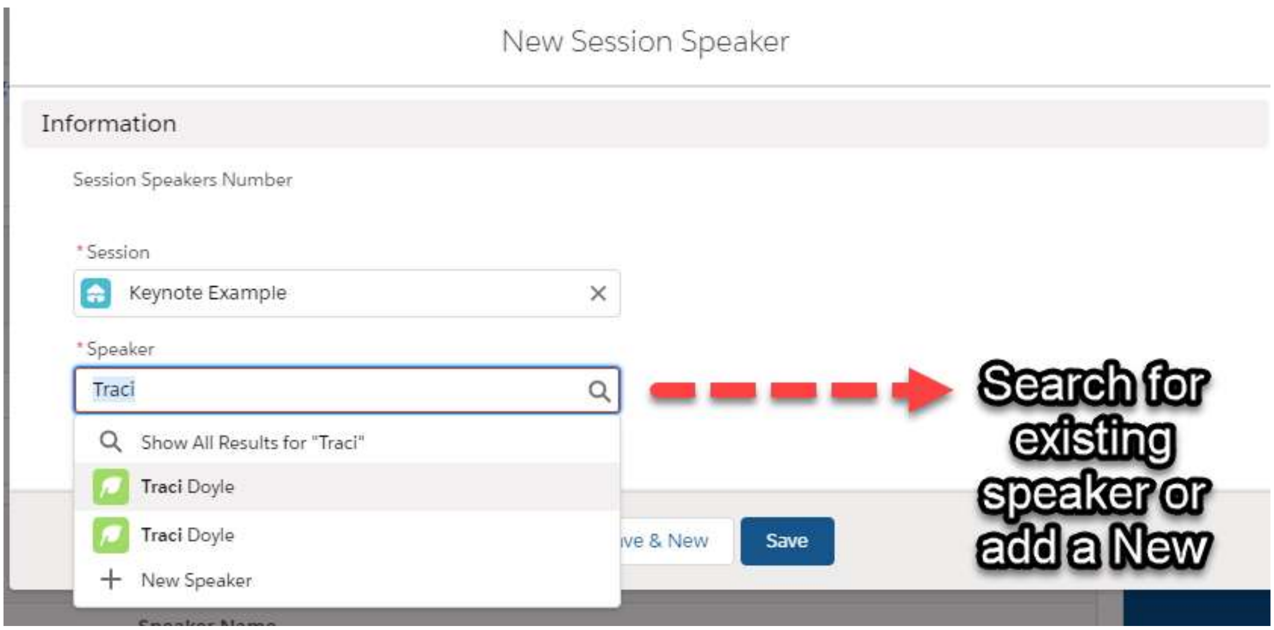
Hit save to return to the Events HQ screen. Hit Save & New to add another session.

Speakers

There is not a defined “Speaker” widget in the Portal. Speakers are first added to a specific Session. Once a speaker is added to one session, they can then be easily linked to multiple sessions.

How to add existing Speakers:

- Select the session that you would like to add speakers. Navigate down to Session Speakers and select New.
- Search for your speaker and select their name. Hit save to return to the session, Save and New to add more speakers.
- **If your speaker is not already in the Speaker system, your will need to add a New Speaker (skip to Add a New Speaker section for instructions)**



Editing Speaker Details

After adding in your existing speaker, you will want to review their profile, and make sure the information is current. Follow the below steps to update the speakers details, including updating bios, LinkedIn pages and photos.

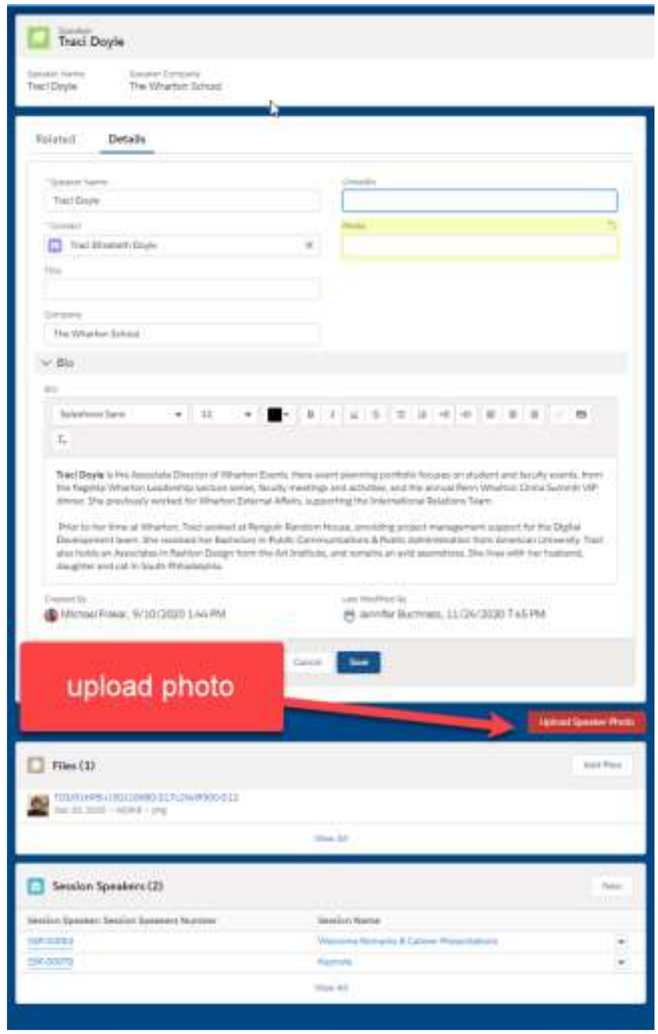
Edit the speakers by going to each session that has a speaker associated, and clicking the speaker name under “Session Speakers”

1. Click the speakers name under the “Session Speakers” box within your session to edit the speaker

1. Review the Details of your speaker, and make any edits necessary to their bio, title, LinkedIn page, etc.

2. Add a photo by selecting the Upload Speaker Photo” button. Recommended file size is 500 x 500 pixels.

   Note that these speakers details are universal among all Portal users -- the details should be generic and not event-specific.



Adding a New Speaker

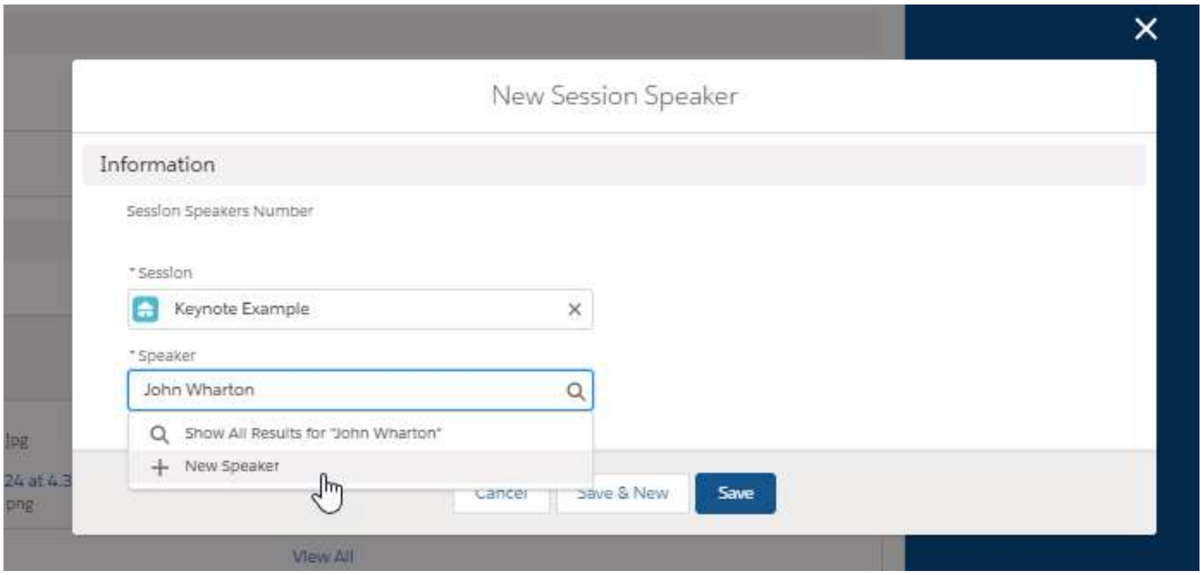
If your speaker does not appear in the search, they need to be added to the Speaker System. Similar to editing a speaker, this can be done through clicking the “Add New Speaker” option directly within a Session, or by adding a new speaker to the Salesforce Session widget.

- Click “New” under **Session Speaker**
- Search for your speaker to double-check they are not in the system; then select **“+New Speaker**”
- In the **New Speaker** pop-up box that appears, add your speaker’s name. You can update the other event details now or return later after you complete the Add New Speaker process
- Under **“Contact”** search for your speaker in the **Salesforce** database. If they are not already in the master database, you will have to add their contact here as well (this is where we store the speakers email address)
    - Select **“+ New Contact”**

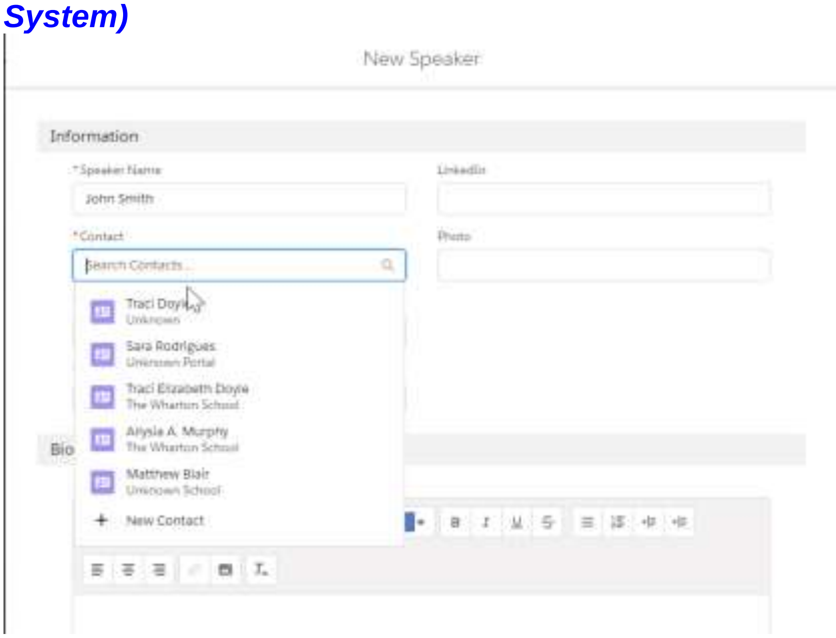
- Complete the name, email fields in the **New Contact: General** pop-up box
- Select the most appropriate **Affiliation** (Participant, Member, Alumni, Vendor)
- Hit Save on the **New Contact** pop up box

- Hit Save on the **New Speaker** box

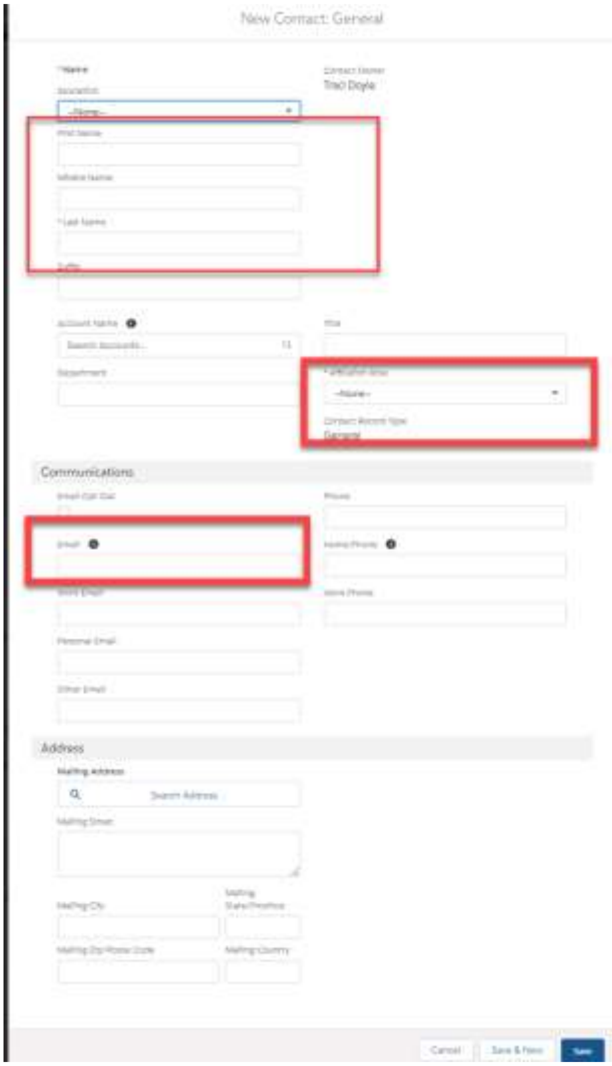
*Step 1: Adding a **speaker** to the **session (Relates a Speaker to your event)***



*Step 2: Search for a **Contact** to the **Speaker Box (Adds Speaker to the Speaker System)***



*Step 3: Adding a **Contact** to the **New Contact: General box (Adds email into Salesforce)***



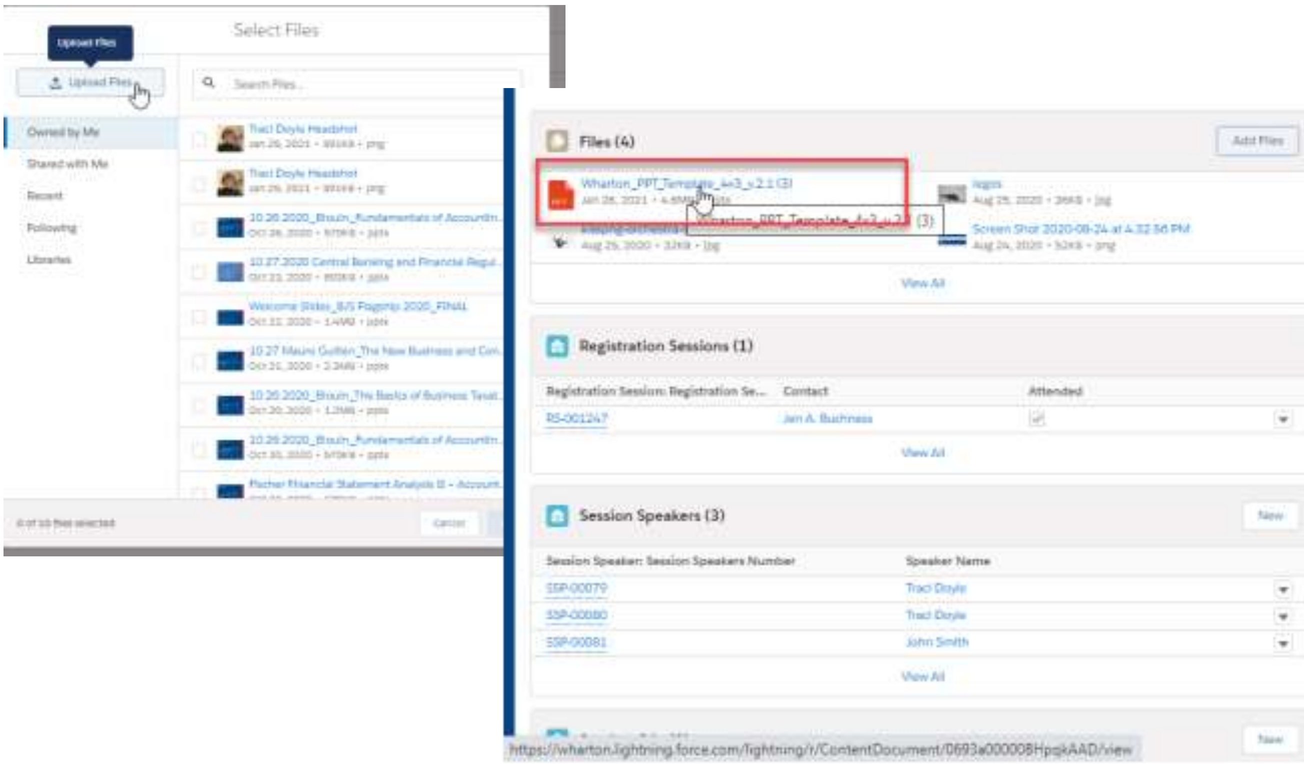
Adding Supporting Documentation

There may be additional documentation that you want to share with your attendees, such as PPT presentations, white papers or supporting instructions that relate to your event sessions.

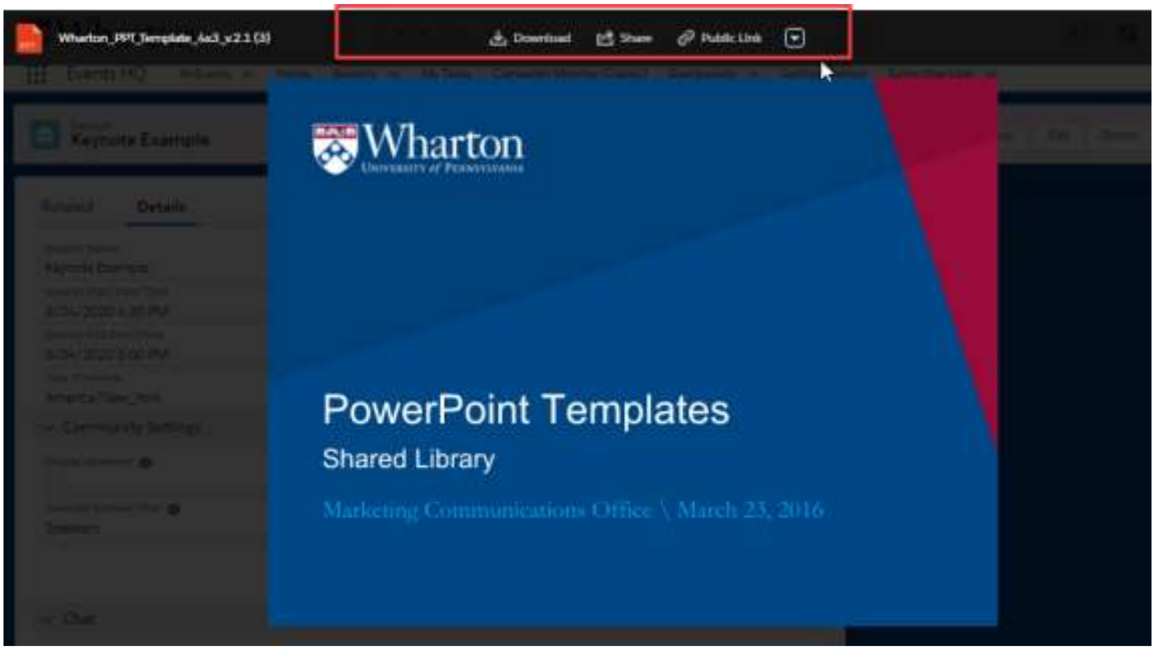
To add supporting documentation, first navigate to the relevant session and follow the below instructions.

1. Under Sessions, go to “Files” and select “New”

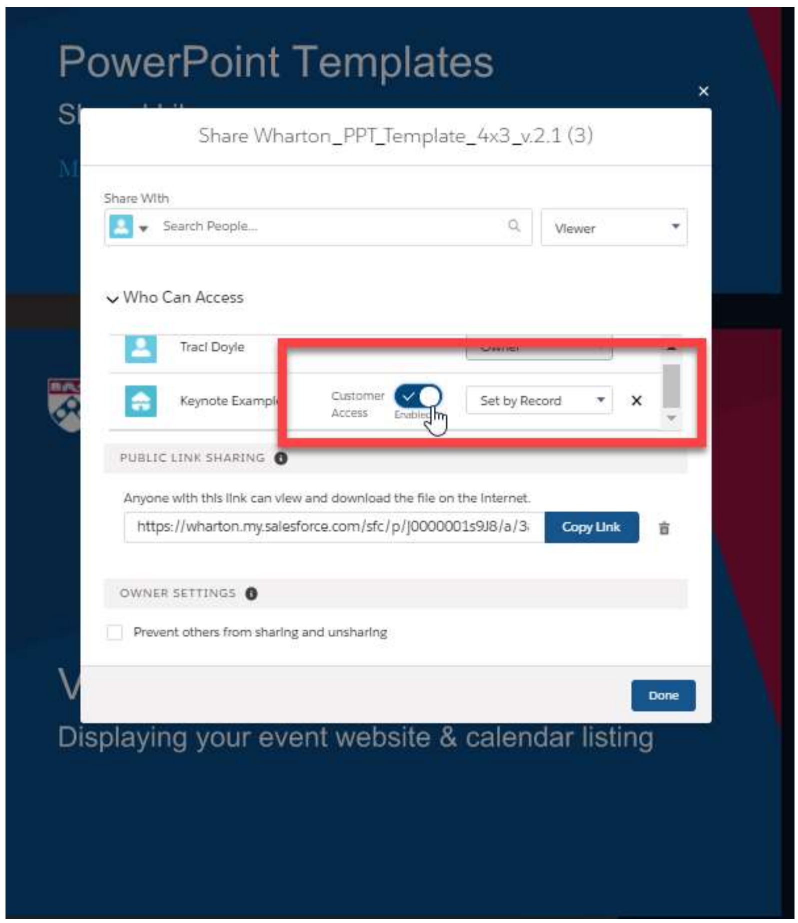
2. Upload the file you want to link to the session. You also can select files you previously updated (great for multi-part sessions that may share supporting documentation)
3. After uploading the file, you will return to the Files section in your session. You will need to re-open your file to add access permissions to make it viewable.



4. Open up the file, and select “Share” from the top drop-down bar



5. A pop-up box will appear. You will need to toggle the switch under **Who Can Access** to allow view access to the file (switch to **Enabled**). On the drop-down box, switch to **Viewer** from Set by Record (this makes sure an attendee cannot upload files). Want to prevent downloading or sharing of files? Check ***Prevent others from Sharing*** under Owner Settings.



Creating and Using Chat

One of the key features of the Events Portal is the chat capabilities. There are multiple options for enabling various chat experiences. Below is a description of the different chat options, and recommendations for use.

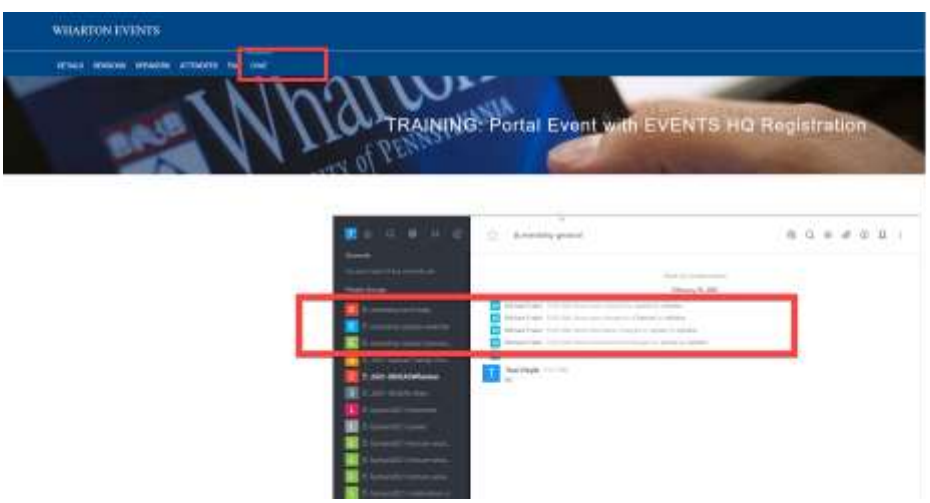
Chat Types

EP Chat/Custom Chat Rooms -- General rooms that are open to all attendees without entering a session. Create rooms for specific conversations, for sharing links, tech questions. These rooms are accessed through the Chat navigation, and open for the duration of your Portal event. Chat rooms are a great way to start a conversation prior to specific session content. Similar to a Slack experience.

Session Chat -- Session chats are session-specific chat rooms. These rooms are only available the day of your event, and will appear on that specific session. The conversation from the session chat is then brought into the General Chat navigation tab.

Event Chat -- Enable Event Chat to appear on a session if you want users to easily access general chat rooms (such as a tech-help room, or general chat where you preloaded discussion questions or links)EP Chat (Event Chat Rooms in Navigation)

Q&A -- Q&A is only available in an individual session. This allows users to submit questions and only a moderator can respond. Use this if you do not want an open chat during a conversation. You can select anyone to be a moderator that is registered for an event.

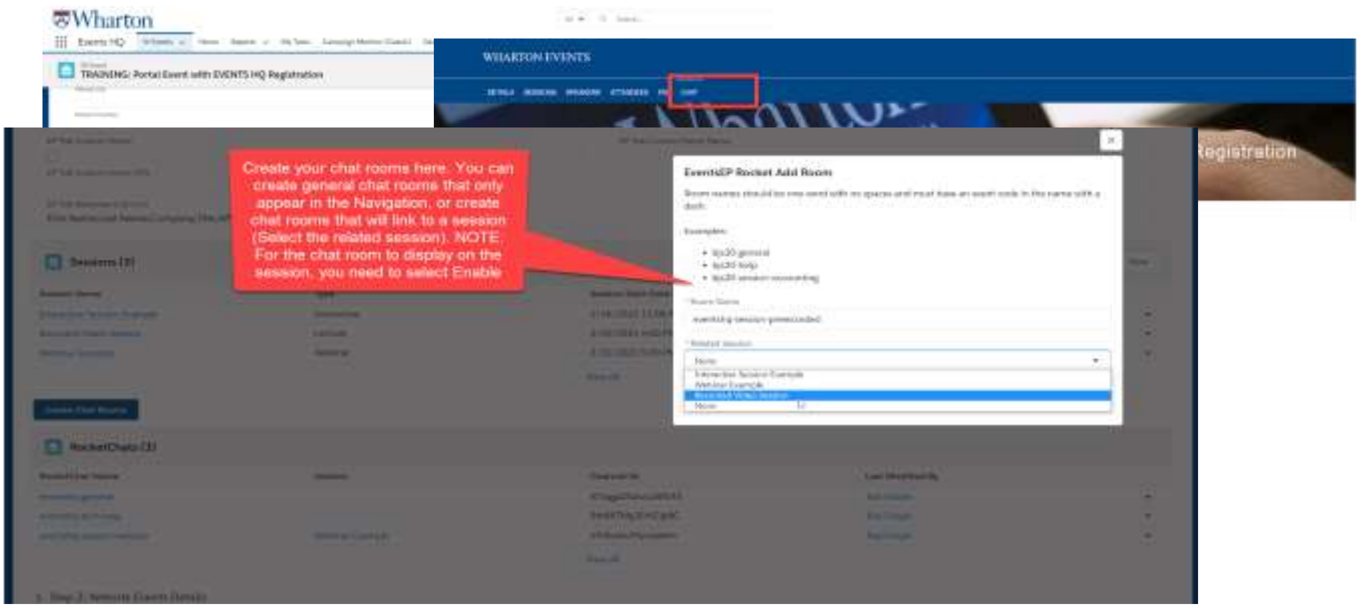


Setting up Chat

EP CHAT/General Event Chat Rooms

Enable Event Chat.

Enable the EP Event Chat in the Portal Tab Configurations. You will see “Chat” appear in your navigation bar



Create General Chat Rooms

You will create any Event Chat and Session Chat rooms in the Rocket Chat widget

- Select create chat room
- Enter your room name -- all room names should have an event specific naming structure (event-2021-tech, event-2021-chat, event-2021-session1-chat)
    - Note the naming structure on the pop up. No spaces, etc.
- You can mark a room as default to make it your main chat space
- If you want the chat to appear on a specific session, select the session to link. If this is a general chat that will appear in the Event Chat Tab only, select None
- Once a chat room is created, it cannot be renamed. If you create a chat room in error and want to have it removed, please create a support ticket or email whartonevents@wharton.upenn.edu
- Chat rooms will be deleted from Salesforce one month post event as routine cleanup.

Session Chat

Session chats are any chat experiences that are only available when a specific session is live. The rooms are ***created*** through Rocket Chat widget like general Chat rooms, but they are ***enabled*** on the individual sessions. These rooms will appear for users when a session is live. They can then continue the conversation in the general chat (the session chat will appear in the Chat tab navigation)

Before beginning, think through HOW your users will interact in a specific session. If it is a live session using Zoom, they should interact in that platform's chat functions. No chat rooms need to be enabled on the session.

If the users will interact within the Portal session (through a pre-recorded video, or livestream into the Portal) then you may want to consider your Session chat options.

Session Chat Types

- ➔ For Session Chat (Users talk openly in a chat room within the session)
  - ◆ Enable Chat, Enable Session chat on the Session
  - ◆ Create and name a chat room through the Rocket Chat widget
  - ◆ Link the Related Session

- ➔ For Q&A (Only moderators answer questions)
  - ◆ Enable Chat, Enable Q&A on the Session
  - ◆ Make someone a moderator through their registration (click their reg, select "make moderator"

- ➔ For Event Chat within a session (if you want users to quickly access a general chat room without leaving the session)
  - ◆ Enable Chat, Enable Event chat on the session
  - ◆ All your chat rooms will appear on the Chat tab within the session

Session Chat Images

Image: Enabling Chat options within a Session

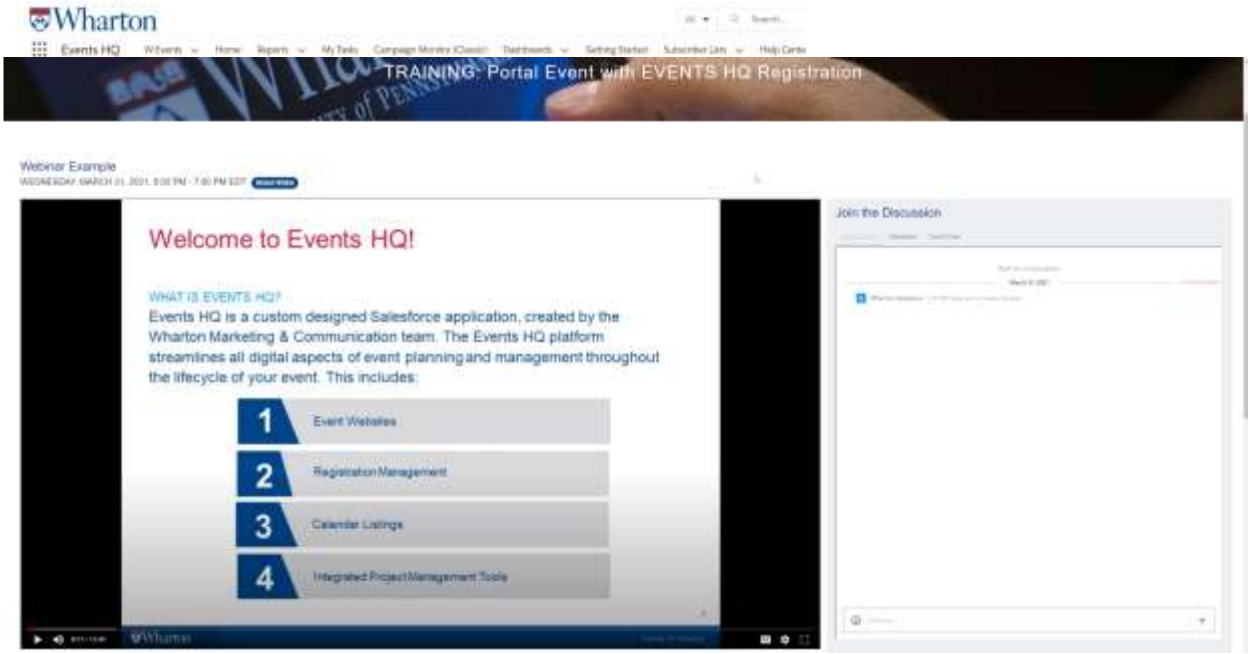


Image: Session Chat – User Experience

Image: Event Chat - Seeing Event Chat within a Session

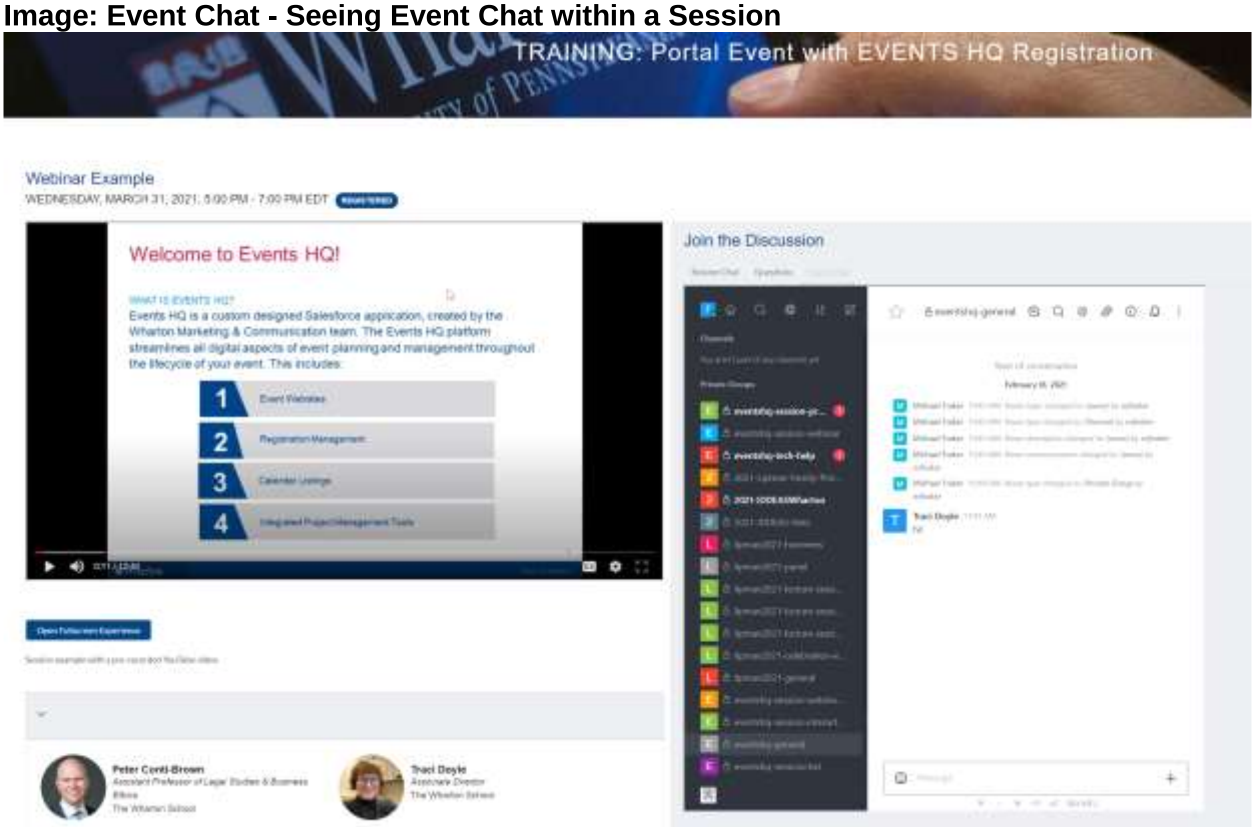
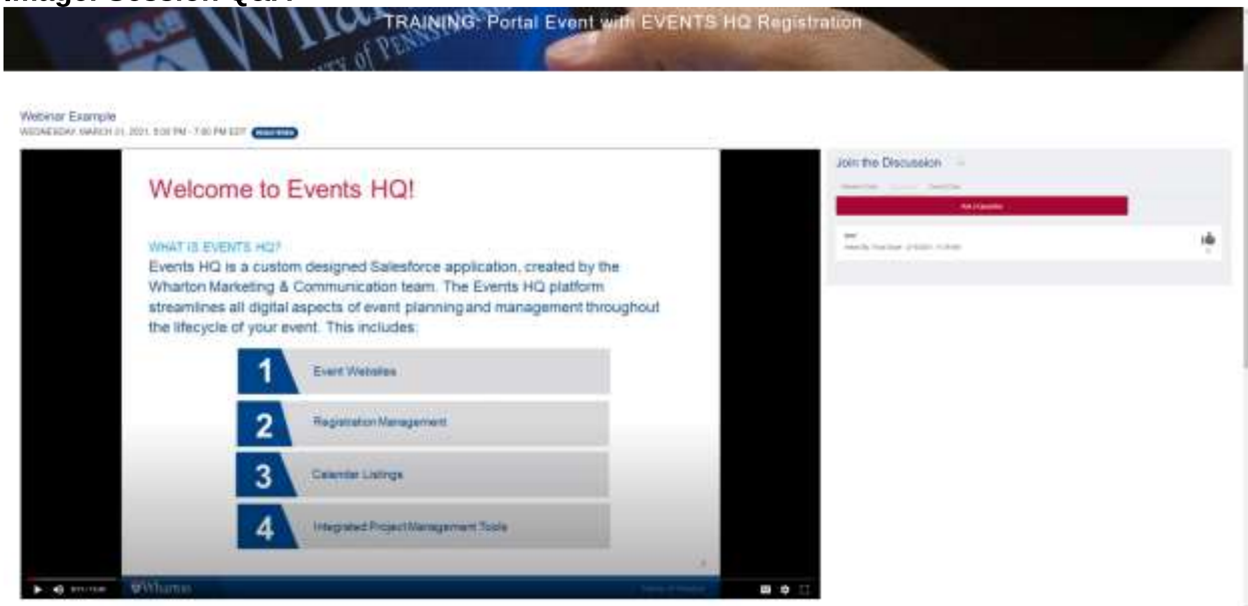


Image: Session Q&A



Part Three – Accessing the Portal

Registering for the event

Your users can start registering for the event before you have the portal setup established. They should be registering either directly in Events HQ, or through CVENT. There are no other event registration platforms compatible with the Portal.

The Portal updates you make are live in the system. Best practice is to have the users registered first, and to receive a confirmation message instructing registered attendees that the Portal link will be shared closer to the event.

Accessing the Portal

When you are ready for attendees to access the Portal, you will want to send an email to all of your registered attendees that includes the portal web address and a short description of the set up process. See below for sample text.

<u>NOTE:</u> If you have an automatic confirmation email set up, you will want to update that messaging to include your Portal instructions for any late registrants after make your Portal event live to the broader group.

➢ **Portal web address:** https://eventportal.wharton.upenn.edu/

Portal Invitation Template

[SAMPLE PORTAL INSTRUCTIONS EMAIL]

Hi Maria –

We are excited to host you for our first virtual [EVENT NAME] taking place [EVENT DATE]

Below you'll find a step-by-step guide on how to access the **Wharton Events Portal,** where all event sessions will be held.

We strongly suggest that you go through these steps before the program begins on Monday, Oct. 26!

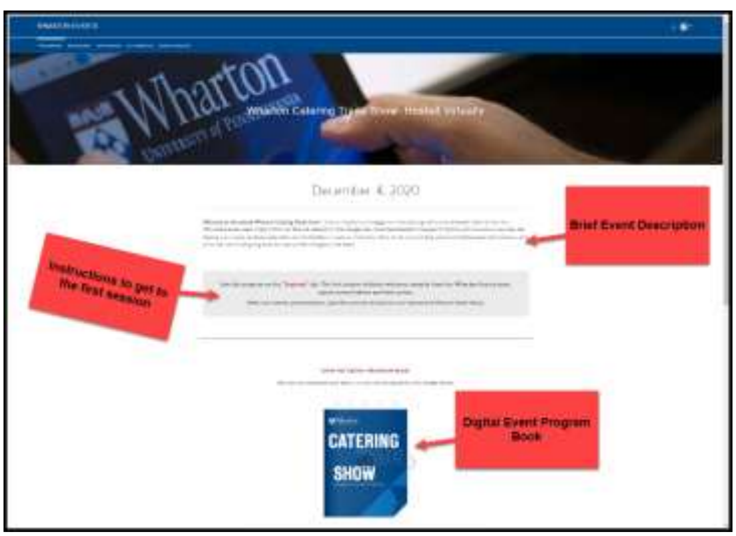
1. Visit the Wharton Events Portal **website**: https://eventportal.wharton.upenn.edu
2. **Enter the email address** you used to Register for the event (if you do not remember, let us know and we can confirm this for you)
3. **Set your password**
4. Click the **Login button**, then click **[EVENT NAME]** to enter the Events Portal
5. Once in the Events Portal, all sessions can be accessed on the **Sessions tab;** FAQs can be found on the **Home tab**

If you experience any issues during the login process, [ENTER YOU LEAD TECH]. We will use Zoom for a majority of our live sessions. Please **ensure that Zoom is installed** on your computer and updated with the latest version.

------------------------------ END DRAFT INVITE EMAIL --

Portal FAQ's

Since this will be most of your attendees' first time using the Wharton Events Portal, we recommend that you include some FAQ's and general information to help familiarize them with the platform. This could take place either in your registration follow-up email or on the homepage of the Portal event, as we've done here:



[Here is a list of frequently asked questions you may want to include.]

Marketing & Portal Access Steps

1. Registration will occur through Events HQ or CVENT (Any time prior to Portal completion)
2. Your Eblast invite will most likely be sent before you are ready to invite attendees into the Portal. Include general details about the Portal and when they should expect access details.
3. Send a Portal Access email to registered attendees up to a week prior to your event (only after the Portal is complete). Update any registration confirmation messaging to direct to the Portal web address, for late registrants.
4. Send an email to all registrants the night before or the day of your event to again encourage them to visit the portal and create their account.
5. Best practice for virtual events is sending an “Event is now live” email to all registrants right as your event is kicking off (about 30 minutes prior to the start of your first session)