Run Sheet overview

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Run Sheets are the on-the-ground roadmap for what needs to be done during (and sometimes after) your meeting or event.

Even today, some event managers prepare run sheets in a multi-page spreadsheet, only to find it's constantly out of date.

Run Sheets help you manage all the micro-tasks needed to successfully deliver your event. The Run Sheet tool lists the tasks allocated to team members, and shows exactly what needs to be done, where and when. As tasks get completed, they're checked off and the Run Sheet updates instantly.

The Run Sheet is tightly integrated with other modules such as Functions and Presentations/Sessions, making sure that all your to-do items get handled efficiently and on time.

The Run Sheet appears in your Organizer App (which you can access on any computer or mobile device), so you can monitor task progress in real time.

Sections of the Run Sheet

The Run Sheet is displayed in a grid you can directly edit. You can also select Edit from the Quick Access Menu to the very right of each run sheet task (also known as the Hamburger Menu).

The Run Sheet displays the following data:

- **Date of the Run Sheet Task**
- **Starting and Ending Time**
- **Task Details** – these are the individual assignments within the run sheet. Tasks are assigned to Team Members, and will track numerous items:
  - Task Name
  - Location
  - Agenda
  - Course (if for a CE Course)
  - Team Members
  - Status
  - Start date and time
  - End date and time
  - Priority
  - Note
- Custom Fields – if you've assigned custom fields to the Run Sheet, they'll also be displayed (and editable) within the grid.

Quick Edit Option

On the right side of each task line you'll see the Quick Edit icon. Clicking on this will let you perform the following tasks:

- Edit – modify the details of the task.
- Clone – create a new task, pre-filled with all the details of this task.

Run Sheet features

The following items are features of the Run Sheet. Read more about each one in this article.

- Run Sheet Filter
- Show Agenda – toggle inclusion of items from Functions and Presentation Sessions.
- Re-Assign Team Members
- Re-Assign Task Date
- View Options
- Excel Import and Export
- Add Task