

# Agenda – tools & features

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## Adding and editing Agenda items

You can create or edit your agenda, including by using the drag-and-drop builder.

Add general sessions, break-out sessions, functions, activities and general information.

Changes will update your agenda in the published (online) locations (websites, apps and portals).

The drag and drop interface lets you:

- Create, drag and drop new agenda items – headings, functions, sessions, activities, breaks and agenda listings.
- Drag across and arrange any un-assigned agenda items, including sessions, functions, activities, breaks and informational listings.
- Arrange the presentations within sessions in any order.

There are two ways to add items (including tracks and headings) to your agenda:

– Adding items using the actions menu (see more information below)

– Using the drag-and-drop builder, including the "+ Add New" element [drag from the right-hand column into the agenda and select what type of item]

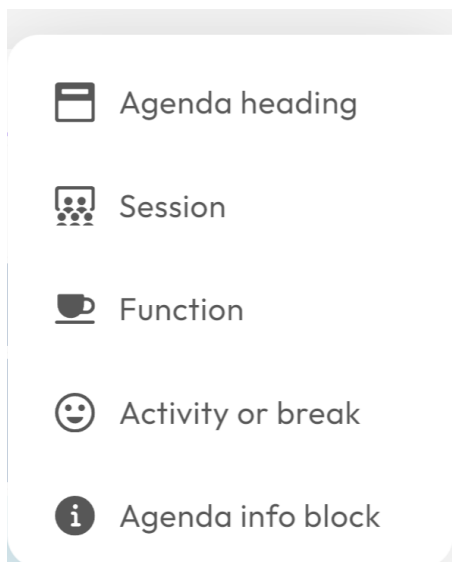
### Adding items when drag-and-drop mode is off

**Agenda**

Drag-and-drop mode is



To add new items in the default view (when Drag-and-drop mode is off), use the **+New** button on the top right and choose which type of item you want to add.



## Switch drag-and-drop mode "On" to use the builder

### Add items created in other modules

Once you're in the drag-and-drop builder, if you've created agenda items (such as Functions or Presentations/Sessions) but didn't add a date and time for them, you'll see them in the right-hand column next to your agenda builder. (You can also drag items out of the agenda and put them into this column to be added back in later.)

There are two tabs here: **Agenda** (which will show functions, activities, and sessions which haven't yet been allocated a day/time) and **Presentations** (which will show unallocated presentation items).

Note the difference between Sessions (which can include multiple presentations) and Presentations/Presentations items.

You can also preview these items by clicking on the **Setup Cog** to the right of each one.

You can also click and drag these items into a timeslot into your agenda (and drag them back into the right-hand column if you decide to 'unallocate' them).

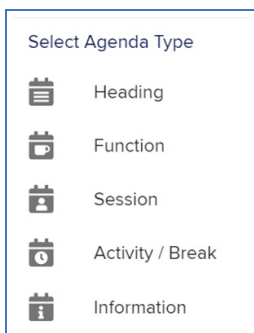
### Editing agenda items

Once you drop an item into the Agenda, you can quickly and easily make changes.

- To change the assigned time, click on the top or bottom edge of the Agenda Item and drag to the desired time.
- To change the assigned date, click on the Agenda Item and drag it to the new day and time.

## Using the *+Add New* feature

In the drag-and-drop builder, you can add elements to your agenda by clicking and dragging **+Add New** from the right-hand column, and dropping it on the desired time slot. You'll then see the following options:



Choose the desired **Agenda Type** to insert into the agenda and complete the details.

## Create Agenda Tracks

In the drag-and-drop Agenda Builder, at the top of the right-hand column, you'll see the "+ Add Track" button.

Alternatively, you can add an agenda track by selecting this option when you create a Function or Presentation (in the Functions module or Presentations module); or when creating a heading (see below).

## Agenda Heading setup

Headings help your attendees understand your agenda, especially when you have concurrent sessions (multiple sessions at the same time); multiple presentations within one session; activities that span multiple tracks etc. You can also add/create a track when you create heading.

When you create a heading, you'll define:

- **Name** – the name of the heading
- **Date** – enter the date
- **Start and End Time** – enter the start and end times
- **Overview** – enter a short description
- **Details** – enter a more detailed description
- **Track** – select a track number (either an existing track, or a new one if you want this track to be created for the date you've nominated).
- **Options** – you can choose to NOT to publish this heading on some or all of these (attendee app; OnAIR portal, event website & portals).
- **Agenda Color** – you can define the colors for this heading.
- **Comment** –this is purely for internal use (it isn't published anywhere).

## More about Functions and Sessions

Once you've added a Function or Session to your agenda, you can click to edit the details and the setup works exactly the same as it would if you went into it straight from the Functions or Presentations Module.

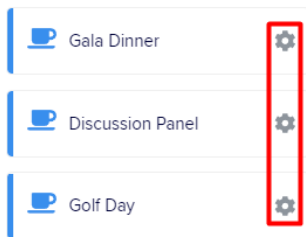
This means you can also define the same settings (alerts, check-in QR codes, publication options, payment policies, OnAIR portal options and more) as you would when working within those modules. Changes you make here will flow through to these modules and vice versa.

[Read more about setting up modules.](#)

Therefore, you don't need to swap to the Setup panel to create new Functions or Sessions – you can create them here directly.

## Viewing Function details

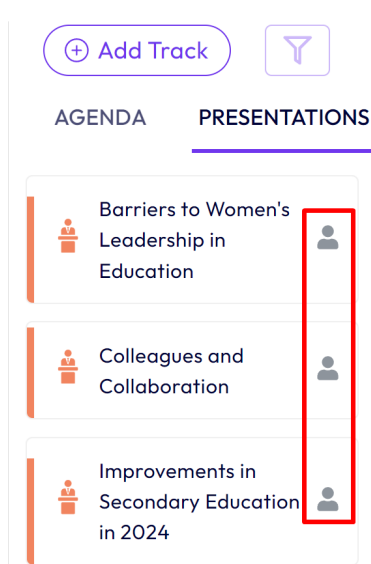
You can select the cog icon to see more details about a Function before adding it.



## Assigning Presentations to a Session

If a Presentation item has been created (for example, on an attendee record) but not yet allocated to a Session, you'll see it when looking under the Presentations tab in the right-hand column of the Agenda Builder.


You can click on the Presenter Icon on the right side of the Presentation to view the Presentation details and the Presenter's Contact Record.



## Adding and editing presentations within sessions


When you add a session onto the Agenda Grid, you'll see **Presentation Icon** and a **Number** in the top right-hand

corner of the Session block.

**Fiscal Principles for Schools**  **0**

This indicates that this item is a **Session**, and the number tells you how many **presentations** are assigned to this **Session**.

As long as you have **at least one presentation in the session**, you can click that top-right icon (the person symbol and the number) to open the **Session Panel**, where you can see details including what presentations have been added to this session.

 **Presentation setup** ✕







Details

**Name**

**Date**

**Time**

Allocated Presentations

 Women Managers in Korea Choi, Kyung-Ah	<input type="text" value="1"/>		
 Colleagues and Collaboration ALLISON, LANI	<input type="text" value="2"/>		

Close

From here, you can:

- Click on the Setup Cog to review and edit Presentation details
- Drag Presentations to put them in a different order
- Click on the "x" to remove any Presentation

## Breaks and activities

Creating an Agenda Activity / Break works much the same setting up Functions or Sessions, with most of the same fields available:

- **Name** – the name of the activity/break.
  - **Date** – the date of the activity/break.
  - **Start and End Time** – the start and end times for the activity/break.
  - **Overview** – a brief description.
  - **Details** – a more detailed description.
  - **Expected Attendees** – an optional field where you can enter an estimated number of attendees.
  - **Track** – you can assign a track number from 1-99 if the activity or break is only assigned to one track, OR have it span multiple tracks.
  - **Options:**
    - Do not Publish to Attendee App
    - Do not Publish to OnAIR
    - Do not Publish to Event Websites and Portals
    - Do not Publish in My Agenda
    - Allow attendees to indicate attendance
  - **In Person Check-In and Check-out options** – you can set up for beacon or QR code check-in and check-out here.
- Location** – select a location (you need to have previously defined these in either Functions or Presentations modules).
- **Room Setup** – add information about seating, podium, and other room layout options.
  - **Food & Beverage** – enter any food & beverage comments here.
  - **Agenda Color** – lets you define text color and background colors viewed on the agenda.
  - **Bold Checkbox** – checking this box will bold the title of the agenda item.
  - **Comment** – purely for your use – not published anywhere.

## A/V tab

If you've created some A/V items in either the Functions or Presentations module, you'll see the A/V tab becomes available in agenda items (functions, sessions, and activities/breaks). These A/V items are then associated with the specified activity/break and will become available on Run Sheets.

## Sponsors tab

You can select a sponsor for the activity/break from your pre-set sponsor list here.

## Run Sheet tab

If you have concurrent sessions enabled, you'll see the Run Sheet tab for Functions, Sessions, and Activities/Breaks in your agenda.

## Access Control tab

You can enable access control here. You can also select a group to track, and add a message to appear when access is denied.

# Adding Agenda Information

This option lets you add general agenda items like separator sections, sub sections or other elements to help you format and organize your agenda.

Select

**Name** – the name of the information item.

- **Date** – the date of the information item.
  - **Start and End Time** – the start and end times for the information item.
  - **Overview** – a brief description of the information item.
  - **Details** – a more detailed description of the information item.
  - **Track** – you can assign a track number from 1-99 if the information item is specific to a track.
  - **Options:**
    - Do not Publish to Attendee App
    - Do not Publish to OnAIR
    - Do not Publish to Event Websites and Portals
    - Do not Publish in My Agenda
    - Allow attendees to indicate attendance
  - **Agenda Color** – lets you define text color and background color viewed on the agenda.
  - **Bold Checkbox** – checking this box will bold the title of the agenda item.
  - **Comment** – strictly for organizer use, this is not published anywhere.
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