Conference Management

Purpose:

The TRAIN Conference Management feature allows administrators to plan and organize virtual, hybrid, or in-person events.

Administrative Roles with Access:

- **Course Provider**

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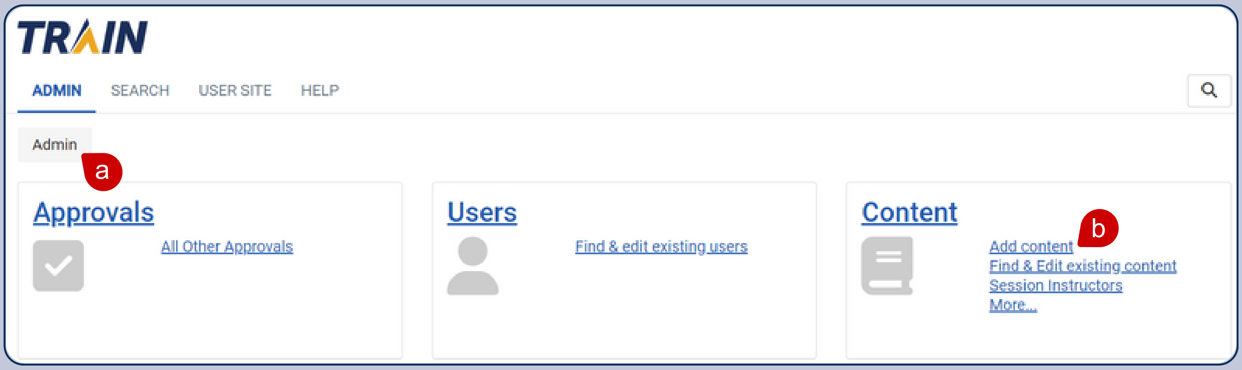
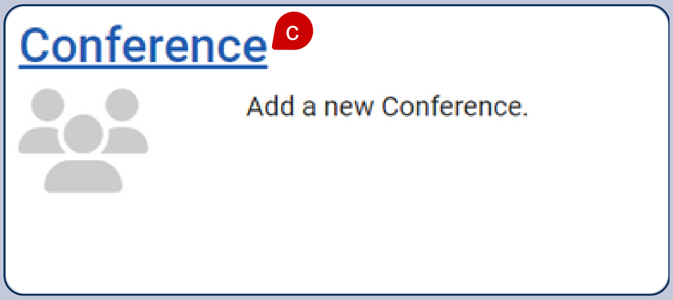
1 Navigate to Conferences

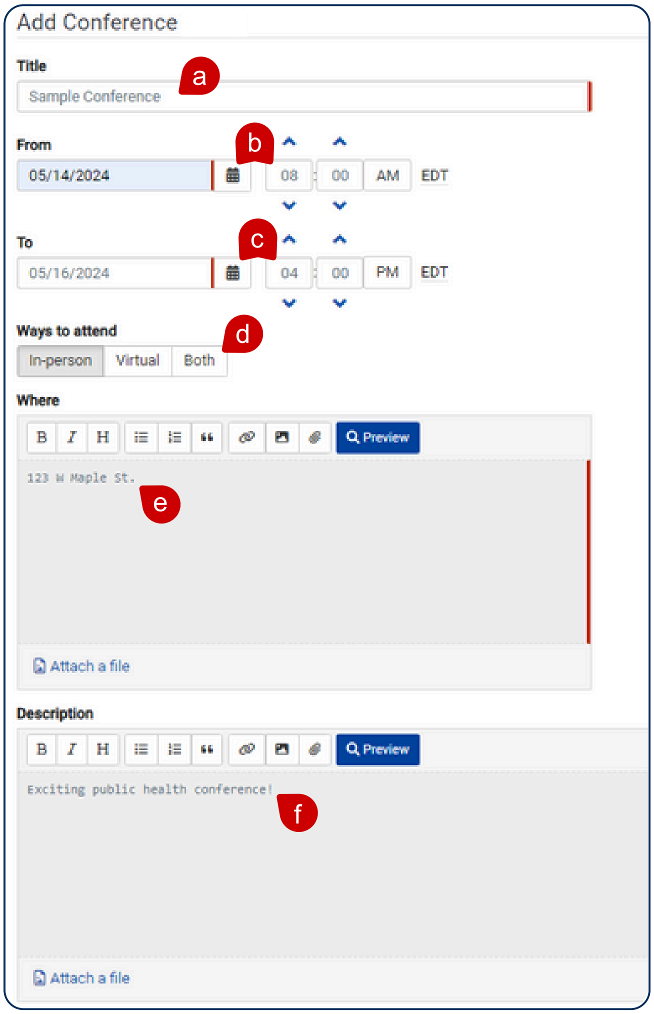
Go to the **(a) Admin** menu. Click the **(b)** Add content link under the **Content** tile.





Select the **(c) Conference** tile to start building a new conference.

2 Create a Conference



Fill in all the required Conference information:

(a) **Title:** Give the conference a name here.

(b) **From:** Select the day and time the conference will begin.

(c) **To:** Select the day and time the conference will end.

(d) **Ways to attend:** Select whether the conference is in-person, virtual, or both (hybrid).

(e) **Where:** Input the address, room, or location name where the conference will take place.

(f) **Description:** Provide an overview of the conference as you want it to appear to registrants here.

TIP: Click the blue **Preview** button to see how the location and/or description will appear to users.

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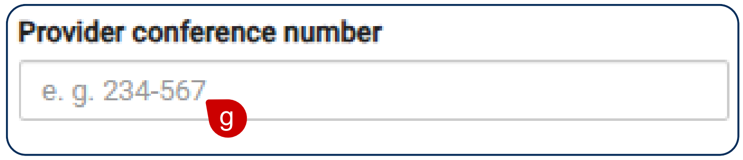
2 Create a Conference (continued)

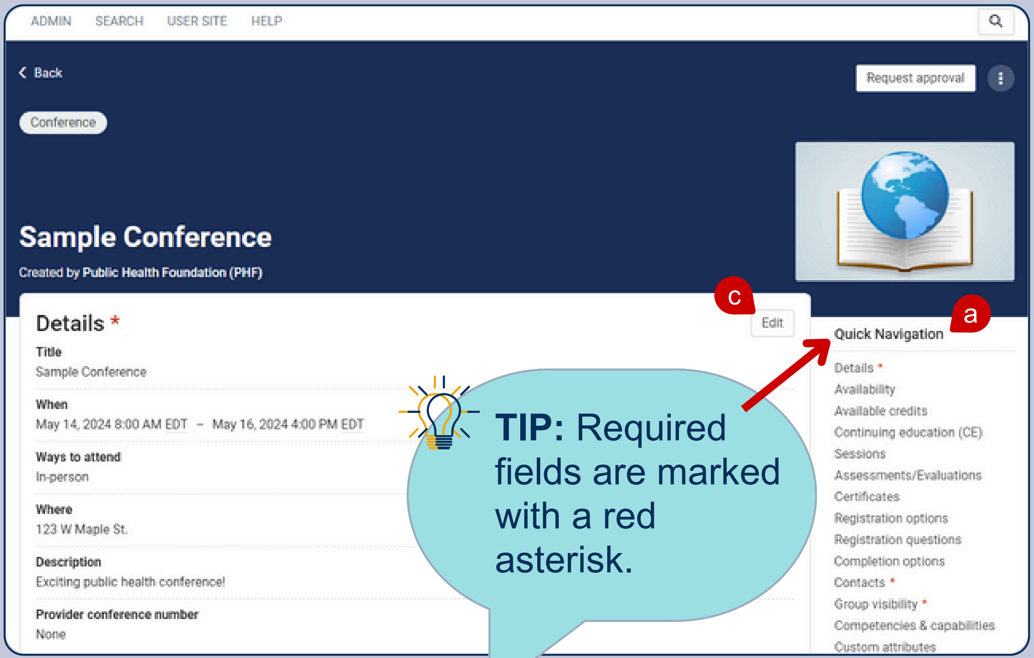
(g) **Provider Conference number:** This field is optional. The number you give will be associated with the conference and can be used to find it in searches.



(h) Click the green **Save** button in the upper right hand corner of the page. This will take you to the Conference Overview page.

3 Edit Conference Settings

The Conference Overview Page allows you to manage conference details and optional settings.



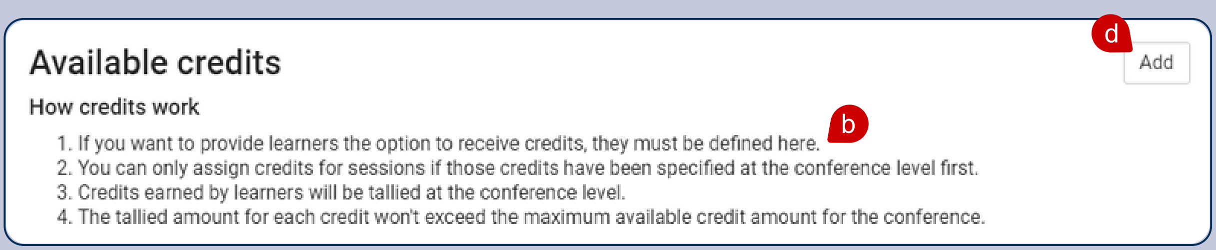
TIP: Required fields are marked with a red asterisk.

(a) Select an option from the **Quick Navigation** panel to jump to that section on the page.

(b) View the text below each setting for a general description and important details regarding your selection.

(c) Click the **Edit** button in the right hand corner of the relevant section box to make changes.

(d) Some sections will have an **Add** button in the right hand corner. Click the button to include the category in your course selections.



TIP: View Step 4 of The General TRAIN Course Wizard user guide for more information on available Conference settings.

TIP: View the Course Roster Management user guide for additional registration management information.

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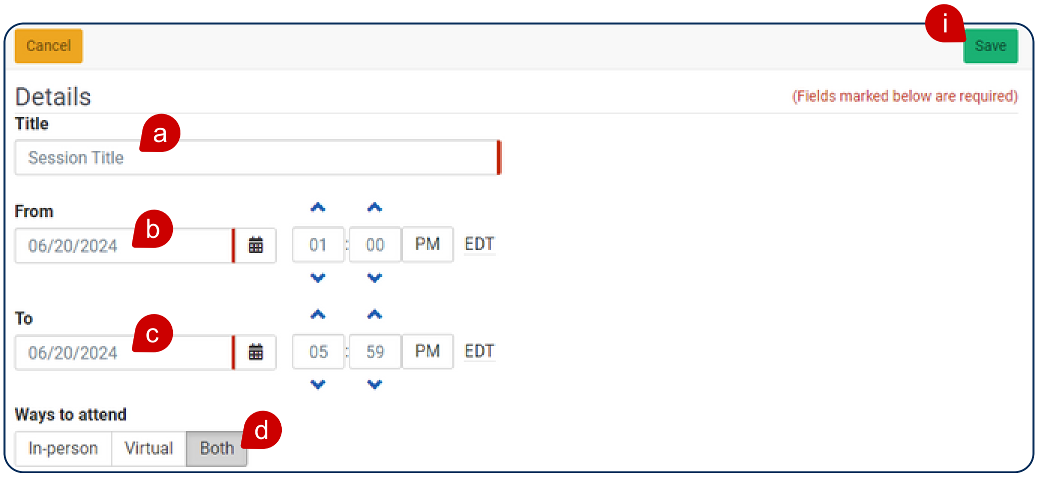
4 Add Conference Sessions

Click the **Add** button on the right hand side of the Sessions section on the Conference Overview page.



(a) Title: Give the session a name.

(b) From: Select the day and time the session will begin.

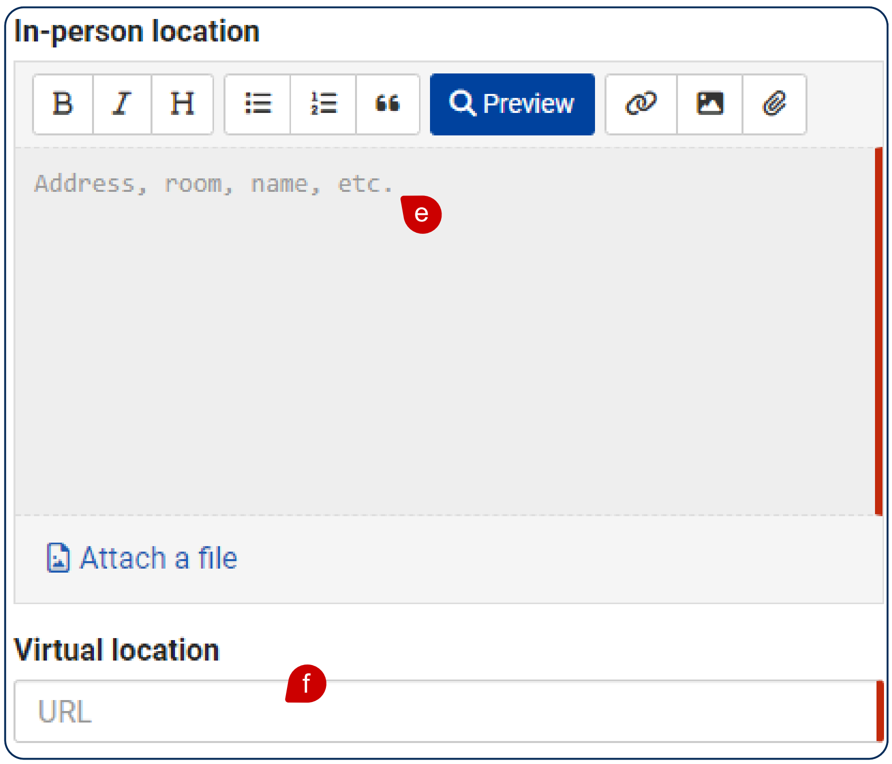
(c) To: Select the day and time the session will end.

(d) Ways to attend: Select whether the session is in-person, virtual, or both (hybrid).

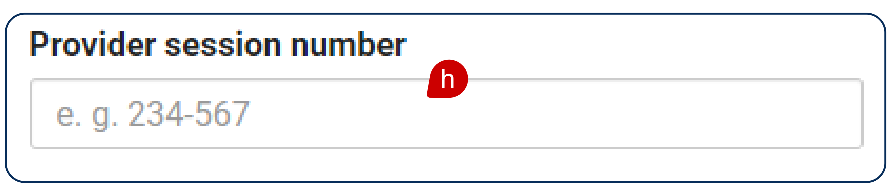
(e) In-person location: If your session is in person, provide the address, room, or location name where it will take place here.

(f) Virtual location: If your session is virtual, provide the URL to access it here.

(g) Description: Provide an overview of your session as you want it to appear to registrants here.



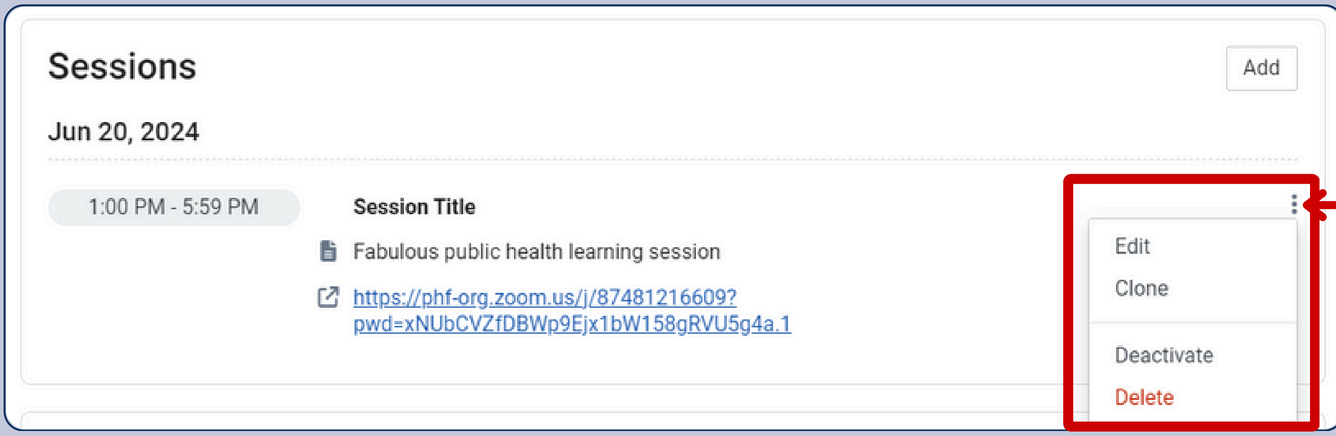
(h) Provider session number: This field is optional. The number you give will be associated with the session and can be used to find it in searches.



(i) Click the green **Save** button.

5 Manage Sessions

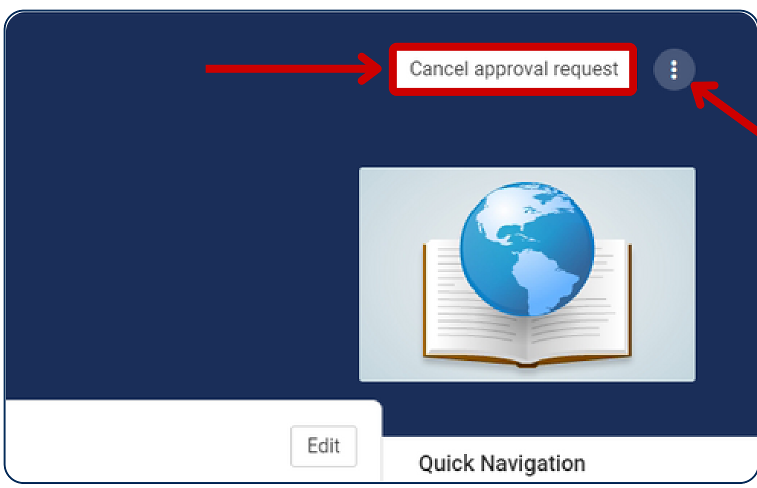
Click the three-dot icon located to the right of a session's details and select the appropriate option from the dropdown menu to edit, clone, deactivate, or delete the session.



6 Request Conference Approval

Click the **Request approval** button in the upper right hand corner of the Conference Overview page. You will receive an email with the course approval manager's response.

To cancel an approval request, click the **Cancel approval request** button located in the same place.



TIP: Click the three-dot menu on the top of the Conference Overview page to change the conference thumbnail, preview conference content, clone the conference, view the conference roster, view reviews, manage status, deactivate, or delete the conference.

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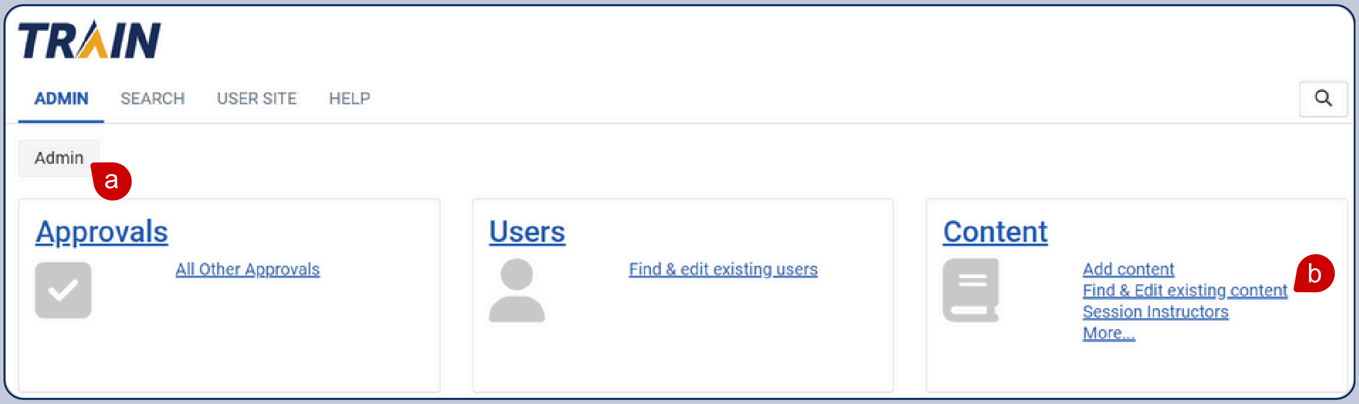
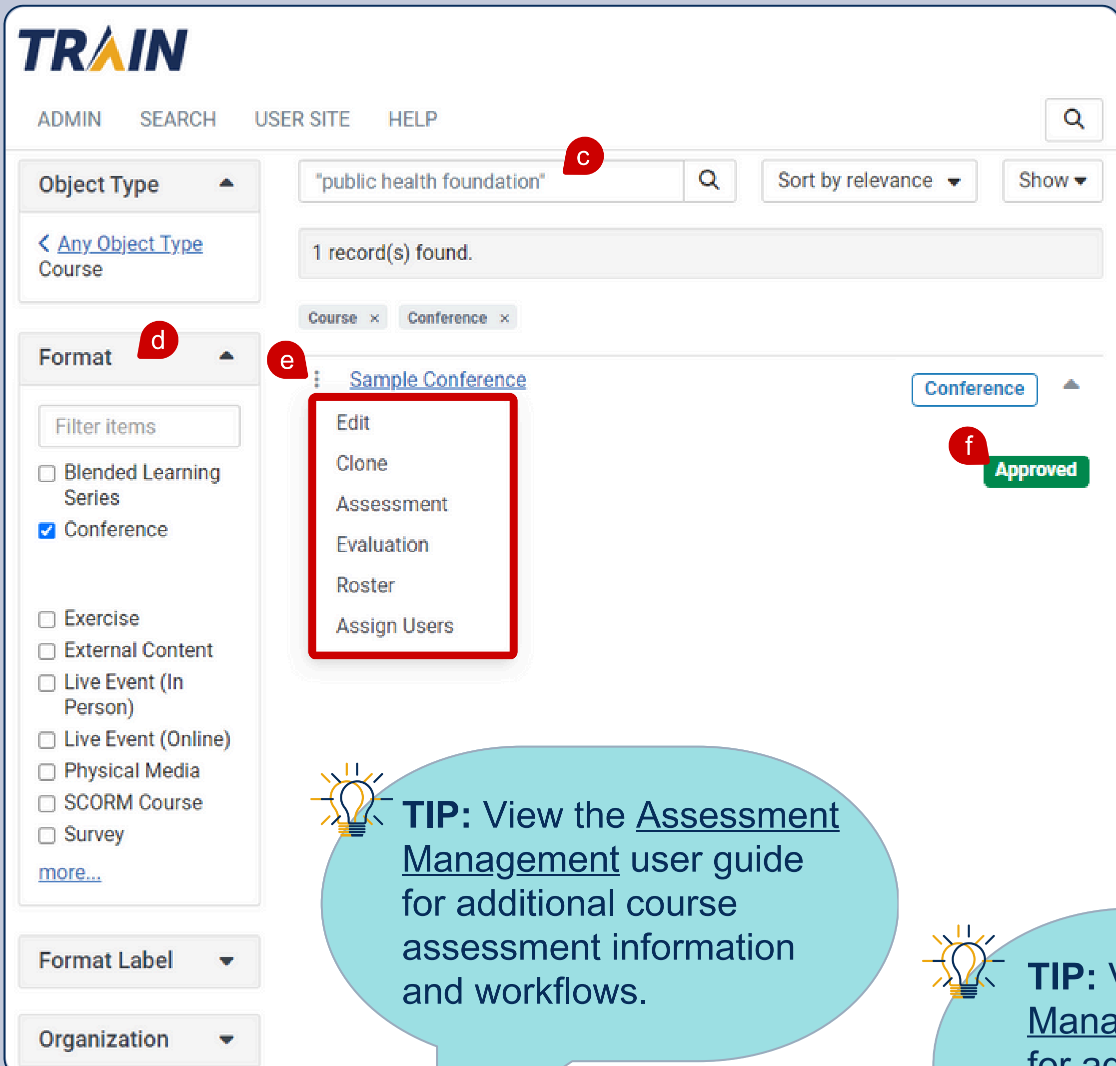
Find and Edit Conferences

7

Go to the **(a) Admin** menu. Click the **(b)** Find & Edit existing content link under the **Content** tile.





(c) Type key words related to the conference in the search bar.

(d) Use the filters on the left hand side of the screen to refine your search. Under the **Format** section, you can select the Conference course type to limit your search results to just conferences.

(e) Click the three-dot icon to the left of the appropriate course. Select an action from the dropdown menu. The **Edit** option will take you to the Conference Overview page.

(f) View approval status here.

TIP: View the Assessment Management user guide for additional course assessment information and workflows.

TIP: View the Evaluation Management user guide for additional course evaluation information and workflows.

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