

# Attendee Portals

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# What is a portal?

A *portal* is a website that you set up to host multiple events, replays, and other content from a single link. With a portal, your visitors register one time and can attend any of the events on the portal. Reporting is similar to event reports, except the results include all events on the portal.

To create a portal, sign in to the Webcast Admin portal. At the top right of the **My Events** tab, click **Create New Portal**. Create the events first and then in portal setup, select the events you would like to include.

This article is an introduction to portals and provides some examples.

## Portal basics

Every portal includes a registration page and a list of events. You can include all types of events: Live, Simulated Live, and On-Demand (or replays). You can also host breakout sessions in any meeting app of your choice; just add the meeting URL.

You can choose from different layouts to set up the registration page. Similar to event setup, you can use branding to customize colors, add logos, add background images, and more. For the portal itself, there are several layouts for listing your events, as well as grouping options to organize the events.

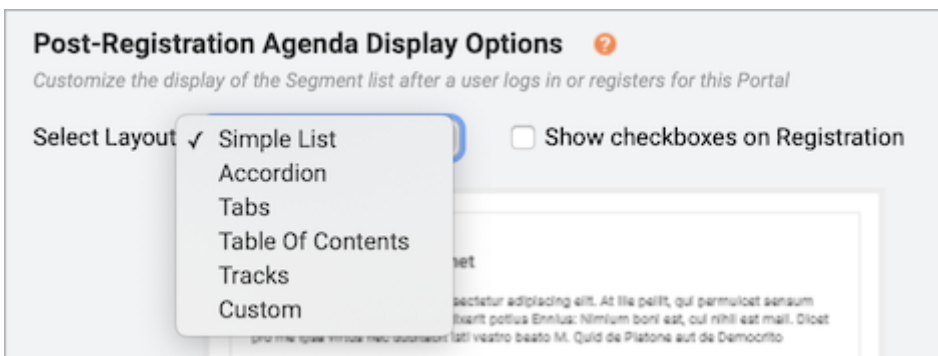
## Organize your events

On a portal, the list of events is called an *agenda* or schedule. Each event linked to the portal agenda is a *segment*.

- On the Portal Layout tab, choose how your portal will look once a visitor signs in.
- On the Manage Segments tab, select the events and breakout sessions to include on the portal agenda and sort them.

The portal sorts events by their scheduled date and time. Depending on the layout you select, you can use automatic grouping to further group events into tabs with their scheduled date or you can create your own custom *categories* (called *tracks*).

- The Simple List layout is just as it sounds - a list of events, sorted by date and time. For automatic grouping, select a different layout.
- The other layouts add visual elements like expandable accordions and tabs to group events. On the Manage Segments tab, create categories and assign events to them or group events automatically by date. The category names or dates display on the accordions, tabs, etc.
- Show checkboxes on Registration is available for Simple List and Custom layouts only. Select this option to allow viewers to select which events they would like to access.

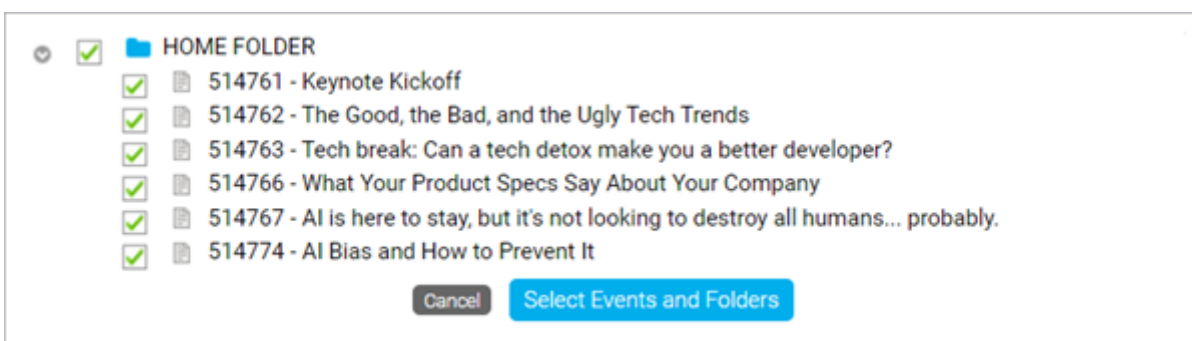


## Example 1 - Simple list of events

This example sets up a portal with six events and two breakout sessions for the same date, sorted by time.

- Layout: Simple List
- Automatic Grouping: None (not available with Simple Layout)
- Categories: None (not available with Simple Layout)

On the Manage Segments tab, click **Add Segments** and select the events to include.



The resulting portal looks like this.



## Example 2 - Events organized into tabs by date


This example sets up a portal with six events and two breakout sessions per date. They are grouped into tabs by their scheduled date. The portal displays the dates on the tabs.

- Layout: Tabs

- Automatic Grouping: Broadcast date tabs
- Categories: None

On the Manage Segments tab, click **Manage Categories** to access the automatic sorting options. You don't have to create any categories.

### Manage Categories




Automatic Grouping:

☐ None

☐ Upcoming events category

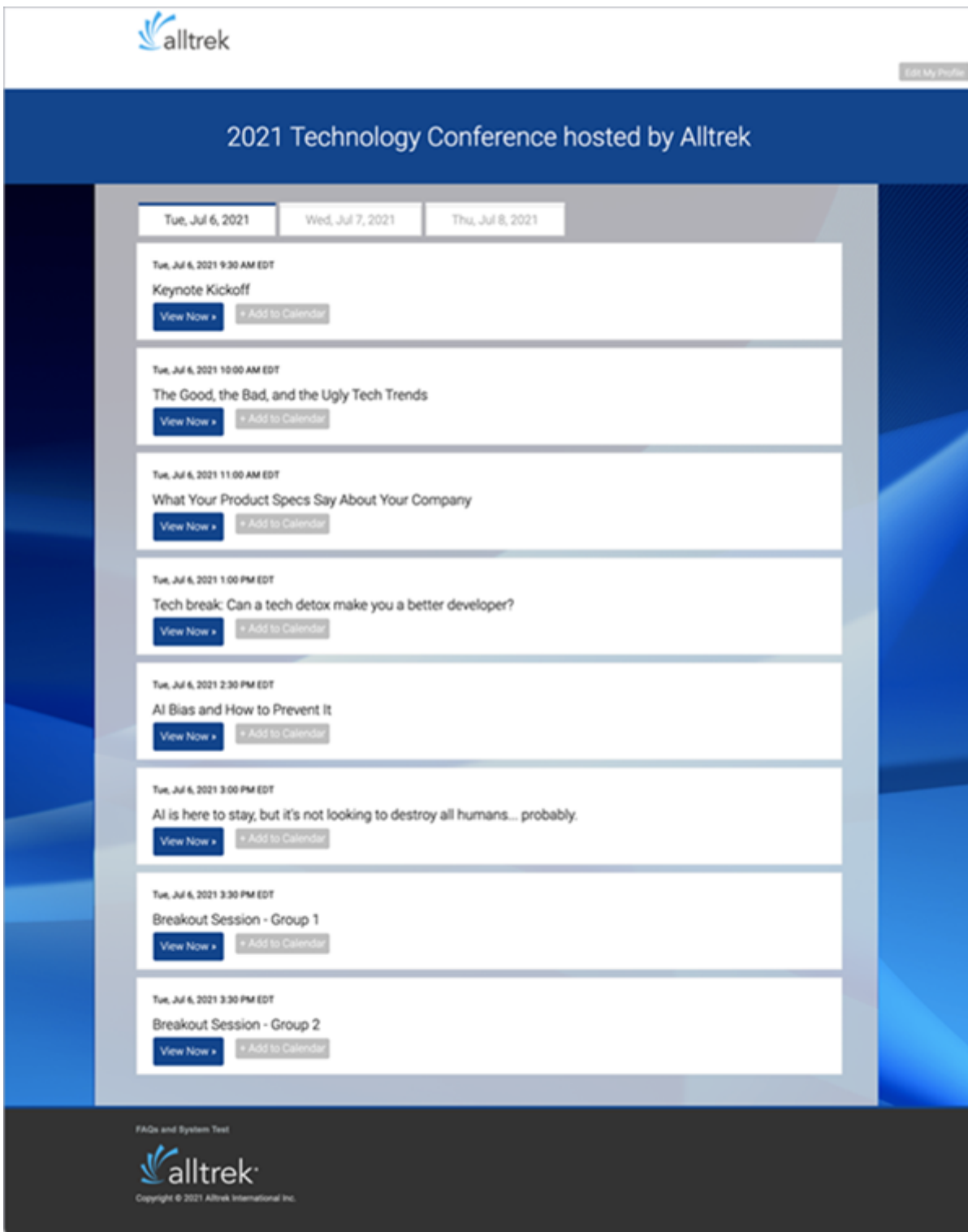
☒ Broadcast date tabs: Prefix:  Date Format: 

Thu, Apr 8, 2021 

Order	Category ID	Display Name	Show	Remove
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Save

The resulting portal looks like this.



## Example 3 - Events organized by categories (tracks)

This example sets up a portal with six events and two breakout sessions per date. They are grouped into three custom categories. The portal displays the category names on the tabs.

- Layout: Tabs
- Automatic Grouping: None

- Categories: Yes

On the Manage Segments tab, click **Manage Categories** to set up the categories. Then assign the events to the categories you created.

### Manage Categories

New Category

Automatic Grouping:

☒ None

☐ Upcoming events category

☐ Broadcast date tabs: Prefix:  Date Format:

Order	Category ID	Display Name	Show	Remove
<input type="text" value="1"/>	<input type="text" value="Day1"/>	<input type="text" value="Day 1: Trends"/>	<input checked="" type="checkbox"/>	<input type="button" value=""/>
<input type="text" value="2"/>	<input type="text" value="Day2"/>	<input type="text" value="Day 2: Cybersecurity"/>	<input checked="" type="checkbox"/>	<input type="button" value=""/>
<input type="text" value="3"/>	<input type="text" value="Day3"/>	<input type="text" value="Day 3: New Technologies"/>	<input checked="" type="checkbox"/>	<input type="button" value=""/>

Save

The resulting portal looks like this:

## 2021 Technology Conference hosted by Alltrek

[Day 1: Trends](#)[Day 2: Cybersecurity](#)[Day 3: New Technologies](#)

Tue, Jul 6, 2021 9:30 AM EDT

Keynote Kickoff

[View Now >](#)[+ Add to Calendar](#)

Tue, Jul 6, 2021 10:00 AM EDT

The Good, the Bad, and the Ugly Tech Trends

[View Now >](#)[+ Add to Calendar](#)

Tue, Jul 6, 2021 11:00 AM EDT

What Your Product Specs Say About Your Company

[View Now >](#)[+ Add to Calendar](#)

Tue, Jul 6, 2021 1:00 PM EDT

Tech break: Can a tech detox make you a better developer?

[View Now >](#)[+ Add to Calendar](#)

Tue, Jul 6, 2021 2:30 PM EDT

AI Bias and How to Prevent It

[View Now >](#)[+ Add to Calendar](#)

Tue, Jul 6, 2021 3:00 PM EDT

AI is here to stay, but it's not looking to destroy all humans... probably.

[View Now >](#)[+ Add to Calendar](#)

Tue, Jul 6, 2021 3:30 PM EDT

Breakout Session - Group 1

[View Now >](#)[+ Add to Calendar](#)

Tue, Jul 6, 2021 3:30 PM EDT

Breakout Session - Group 2

[View Now >](#)[+ Add to Calendar](#)

[FAQs and System Test](#)



## Add events to a portal

With a portal, viewers can register one time and attend any of the events on the portal. After you select a portal layout, start adding events (segments) to your portal from the Manage Segments tab. You can include Live, Simulated Live, and On-Demand (replay) events and include a description for each event you add.

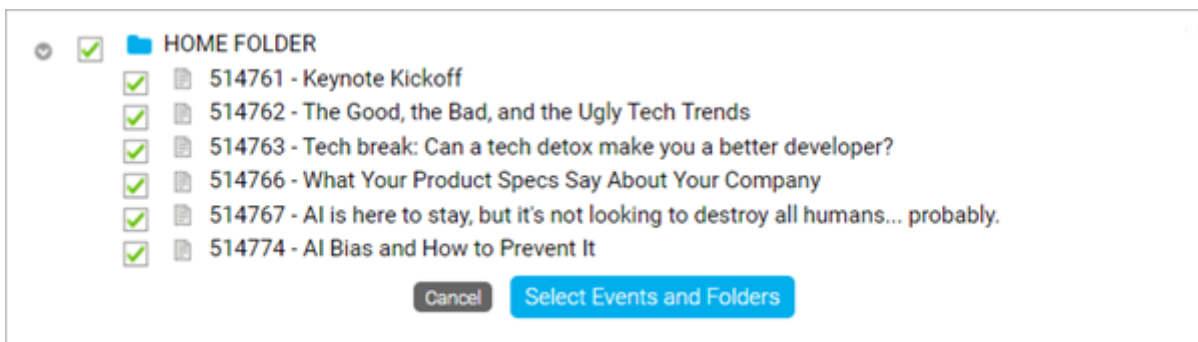
**Note:** An event can be linked to only one portal at a time. If you want to add an event that is used on another portal, go to that portal and remove the event first.

### To add events to a portal:

1. Sign in to the Webcast Admin portal and edit the portal.
2. On the left panel, click the **Manage Segments** tab.
3. At the top right of the tab, click **Add Segments**.

The page lists events that are not linked to other portals.

4. Select the events you want to include and then click **Select Events and Folders**.



The selected events display on the Manage Segments tab under Linked Segments.

Manage Segments for 2021 Technology Conference ho... (514698)

Linked Segments ●

Manage Categories + Add Breakout + Add Segments

Order	Event ID	Event Name	Event Status	Show	Access	Segment ID		
1	514761	Keynote Kickoff	Scheduled for: Tue, Jul 6, 2021 9:30 AM EDT	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">ON</span>	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">ON</span>	28		
2	514762	The Good, the Bad, and the Ug...	Scheduled for: Tue, Jul 6, 2021 10:00 AM EDT	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">ON</span>	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">ON</span>	29		
3	514763	Tech break: Can a tech detox ...	Scheduled for: Tue, Jul 6, 2021 1:00 PM EDT	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">ON</span>	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">ON</span>	30		
4	514766	What Your Product Specs Say A...	Scheduled for: Tue, Jul 6, 2021 11:00 AM EDT	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">ON</span>	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">ON</span>	31		
5	514767	AI is here to stay, but it's ...	Scheduled for: Tue, Jul 6, 2021 3:00 PM EDT	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">ON</span>	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">ON</span>	32		
6	514774	AI Bias and How to Prevent It	Scheduled for: Tue, Jul 6, 2021 2:30 PM EDT	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">ON</span>	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">ON</span>	33		

➔ Back to Summary Save and Continue ➔

- Click the **Edit** button next to an event to add a description. The description displays under the title of the event on the portal. After adding a description, click **Save Changes**.

Segment 514761 Details

These elements will be displayed in the Segment block on your Portal Landing Page. Add or remove each from the Landing page using Auto Fields in the Segment Builder.

Segment Title: Keynote Kickoff  
 Segment Date: Tue, Jul 6, 2021 9:30 AM EDT  
 Segment Description:

**B** *I* U  $x_2$   $x^2$  **A** **T**

Join Louisa Young for our annual 2021 Technology Conference kickoff! We'll cover the conference agenda and break the audience up into groups for breakout sessions.

Event 514761's Landing Page Content: Provided for reference only + Add to Calendar

Keynote Kickoff  
 Tue, Jul 6, 2021 9:30 AM EDT

Cancel Save Changes

- Click **Save and Continue** to save the events to the portal.

Once you've added events, you can [sort them into categories](#) and hide or restrict access to them.

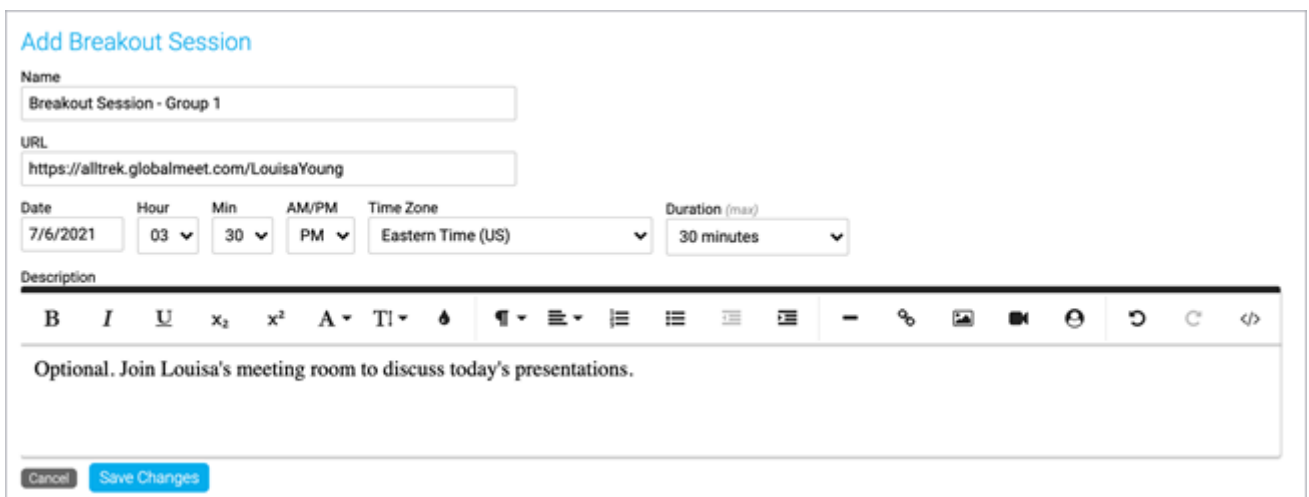
# Add breakout sessions to a portal

Engage your viewers and allow viewers to attend breakout sessions from the portal agenda page. After you select a portal layout, you can start adding breakout sessions (segments) to your portal from the Manage Segments tab and link them to any meeting app you choose, including GlobalMeet Collaboration, Zoom, Microsoft Teams, and more. Breakout sessions display in the list of events on your portal.

**Note:** Viewers can access your meeting room link before the scheduled breakout session time. Ensure that your meeting has security features, such as a waiting room, turned on to prevent guests from joining early. Or, you can hide the View Now button after you've created the breakout session.

## To add a breakout session:

1. Sign in to the Webcast Admin portal and edit the portal.
2. On the left panel, click the **Manage Segments** tab.
3. At the top right of the tab, click **Add Breakout**.
4. Enter a name for the session and your meeting link, schedule the breakout session, and optionally add a description.



The screenshot shows the 'Add Breakout Session' form. It includes fields for Name, URL, Date, Hour, Min, AM/PM, Time Zone, and Duration (max). The Name field contains 'Breakout Session - Group 1'. The URL field contains 'https://alltrek.globalmeet.com/LouisaYoung'. The Date field is set to '7/6/2021', Hour to '03', Min to '30', AM/PM to 'PM', Time Zone to 'Eastern Time (US)', and Duration to '30 minutes'. Below these fields is a Description field with a rich text editor toolbar. The description text is 'Optional. Join Louisa's meeting room to discuss today's presentations.' At the bottom of the form are 'Cancel' and 'Save Changes' buttons.

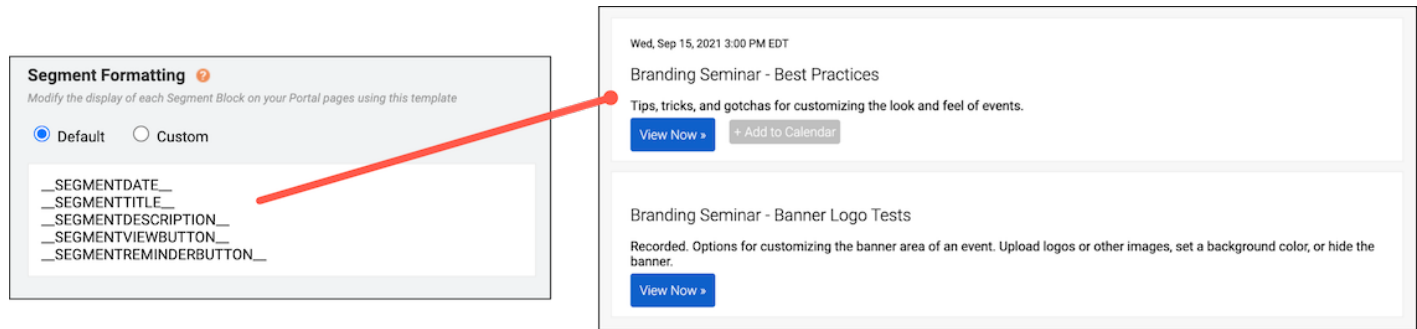
5. Click **Save Changes** to save the session. Then click **Save and Continue** to save changes to the portal.

Once you've added the sessions, you can [sort them into categories](#).

# Auto-fields for event details on a portal

Jump to: [Auto-field Reference](#) | [Customization Example](#)

The portal agenda displays specific details about each event, or linked *segment*. It uses *auto-fields* - that is, placeholders or variables - to pull in specific details about each event. By default, the agenda includes the date, title, and description for the event, with View Now and Add to Calendar buttons.



To customize the details displayed, go to the Portal Layout tab and under Segment Formatting select **Custom**. This opens the Content Editor, where you can add and apply styling to auto-fields as well as include text, images, and other elements. Available auto-fields are displayed below the edit area.

**Important:** Segment formatting sets the content displayed for every event. Only include text or images that you would like repeated with each segment block.

## Auto-field reference

The format of an auto-field is \_\_AUTOFIELD\_\_ (the auto-field with two underscores before and after).

The following table explains the available auto-fields and the text they display.

Auto field	Description
__SEGMENTDATE__	Scheduled day, date, and time
__SEGMENTTITLE__	Event title
__SEGMENTTIME__	Scheduled time

Auto field	Description
__SEGMENTDESCRIPTION__	The description you entered on the Manage Segments tab
__SEGMENTVIEWBUTTON__	View Now button
__SEGMENTREMINDERBUTTON__	Add to Calendar button
__SEGMENTLIVENOW__	Add a live indicator to events on the portal when their scheduled date and time arrives

## Per-event registration

If you are using per-event registration, you can add event registration to the main registration page. This lets visitors register for the portal and specific events at the same time. For more information, see [Have viewers register for individual events on a portal](#).

On the Registration tab, scroll to Customize Event Landing Page and next to Landing Text, select **Custom**.

The following table explains the available auto-fields.

Auto field	Description
__ALLSEGMENTS__	All events linked on the portal
__SEGMENTBLOCK1__	The first event linked on the portal, based on the order you set on the Manage Segments tab
__SEGMENTBLOCK2__	The second event linked on the portal
__SEGMENTBLOCK3__	The third event linked on the portal
__SEGMENTBLOCK4__	The fourth event linked on the portal
__SEGMENTBLOCK#__	The <i>Nth</i> event linked on the portal

## Customization example

This example adds text before the `__SEGMENTTIME__` auto-field to update the first line of each segment block. By default, text on the first line is smaller than other details. In the Content Editor, we selected the updated line and clicked the **Text Size (T)** button to increase the font size.

Segment Formatting

Modify the display of each Segment Block on your Portal pages using this template

Default

Custom

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Join us Wednesdays at \_\_SEGMENTTIME\_\_

\_\_SEGMENTTITLE\_\_

\_\_SEGMENTDESCRIPTION\_\_

\_\_SEGMENTVIEWBUTTON\_\_

\_\_SEGMENTREMINDERBUTTON\_\_

Join us Wednesdays at 9:00 AM EDT

Location-based registration

A short demonstration of how you can target registration questions based on attendee locations (countries).

View Now »

+ Add to Calendar

Join us Wednesdays at 3:00 PM EDT

Branding Seminar - Best Practices

Tips, tricks, and gotchas for customizing the look and feel of events.

View Now »

+ Add to Calendar

Available Auto Fields: \_\_SEGMENTTITLE\_\_ \_\_SEGMENTVIEWBUTTON\_\_ \_\_SEGMENTDATE\_\_ \_\_SEGMENTTIME\_\_ \_\_SEGMENTREMINDERBUTTON\_\_ \_\_SEGMENTDESCRIPTION\_\_ \_\_SEGMENTLIVENOW\_\_

# Have viewers register for individual events on a portal

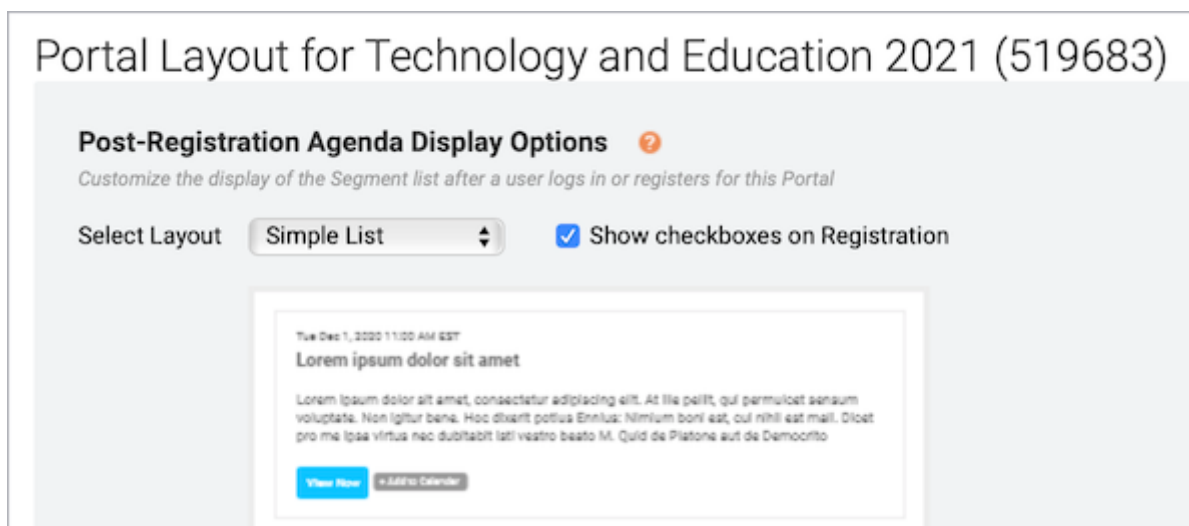
Available with Simple List and Custom portal layouts (on the Portal Layout tab).

With a portal, your viewers register one time and can attend any of the events after signing in to the portal. If you want, you can add checkboxes to the portal agenda and let viewers register for the events they plan to attend.

When a viewer enters a specific event from the portal, their registration data is included in the event's reports.

## Enable registration checkboxes

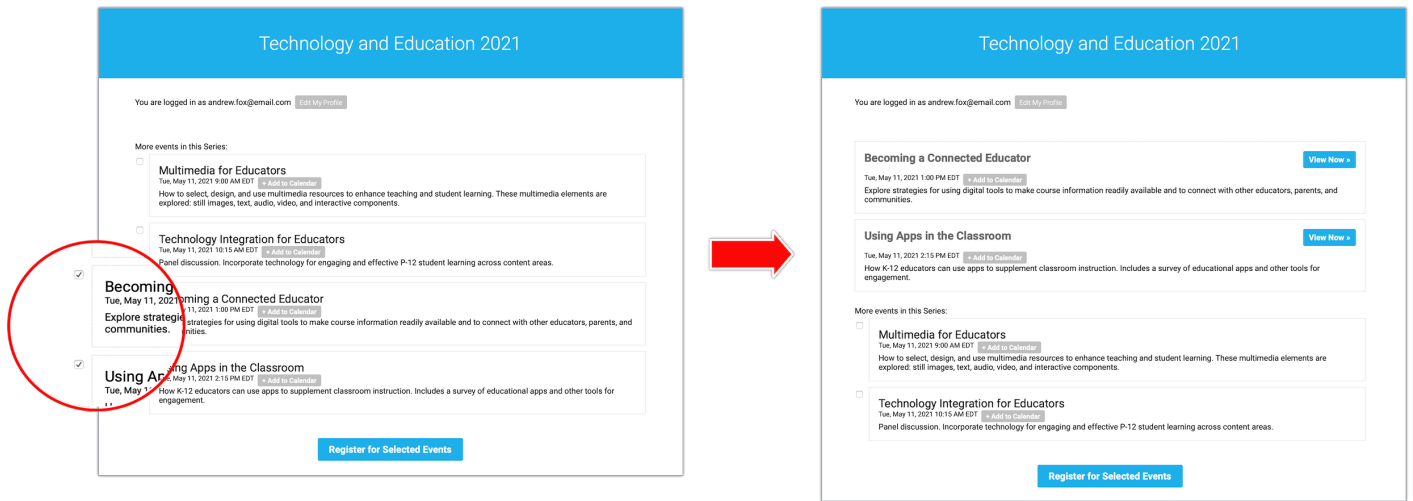
On the Portal Layout tab, select **Simple List** or **Custom** layout and select **Show Checkboxes on Registration** on **Registration**.



You can use the provided agenda format or scroll to Segment Formatting and select **Custom**.

## What your viewers see

On the portal agenda, viewers initially see a list of events with check boxes. They select each event they plan to attend and then click **Register for Selected Events**. Registered events are listed events at the top, followed by additional event they could register for.



## Example code

Here is the coding from the previous example.

```
<div style="border: 1px dotted #ccc; padding: 16px; margin-bottom: 10px;"> <div style="width: auto;
<div style="float: right; text-align: right;">__SEGMENTVIEWBUTTON__</div>
<div style="clear: both; float: left;"><span style="font-size: 12px;">__SEGMENTDATE__</span></div>
<div style="float: left;"><span class="reminderButton" style="margin-left: 6px;">__SEGMENTREMINDER__</span>
</div>
```

### To use this formatting:

1. On the Portal Layout tab, scroll to Segment Formatting and select **Custom**.
2. At the right side of the editor, click **</>** to switch to code view.
3. Delete all the placeholder code.
4. Paste the example code.
5. Click **Save and Continue**.



# Sort events and breakout sessions into categories

After you [add events](#) and [breakout sessions](#) to the portal, the portal automatically sorts them by their scheduled date and time. Depending on the portal layout you select, you can further group your events with automatic grouping and sort events into tabs by broadcast date or into custom *categories (or tracks)* you create.

## Select a layout

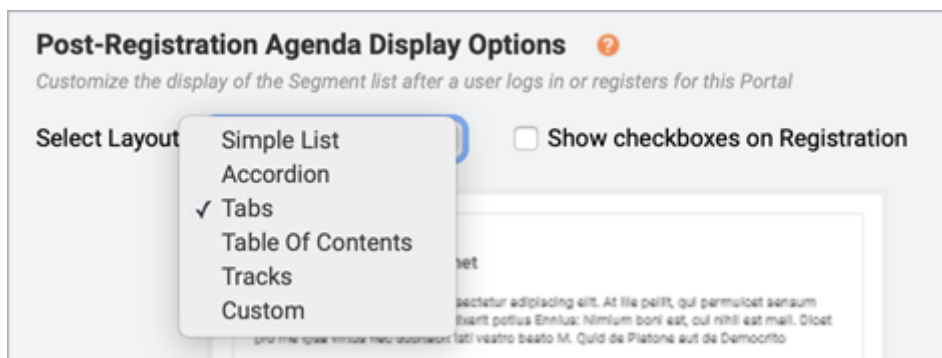
Before you categorize events and breakout sessions, you must select the correct layout.

Sign in to the Webcast Admin portal and edit the portal.

### To select a layout:

1. On the left panel, click the **Portal Layout** tab.
2. Under **Post-Registration Agenda Display Options**, select the:
  - **Tabs** layout to sort events into broadcast date tabs.
  - **Accordion**, **Tabs**, **Table of Contents**, or **Tracks** layout to sort events into custom categories.

**Note:** Simple List and Custom layouts do not support automatic grouping.

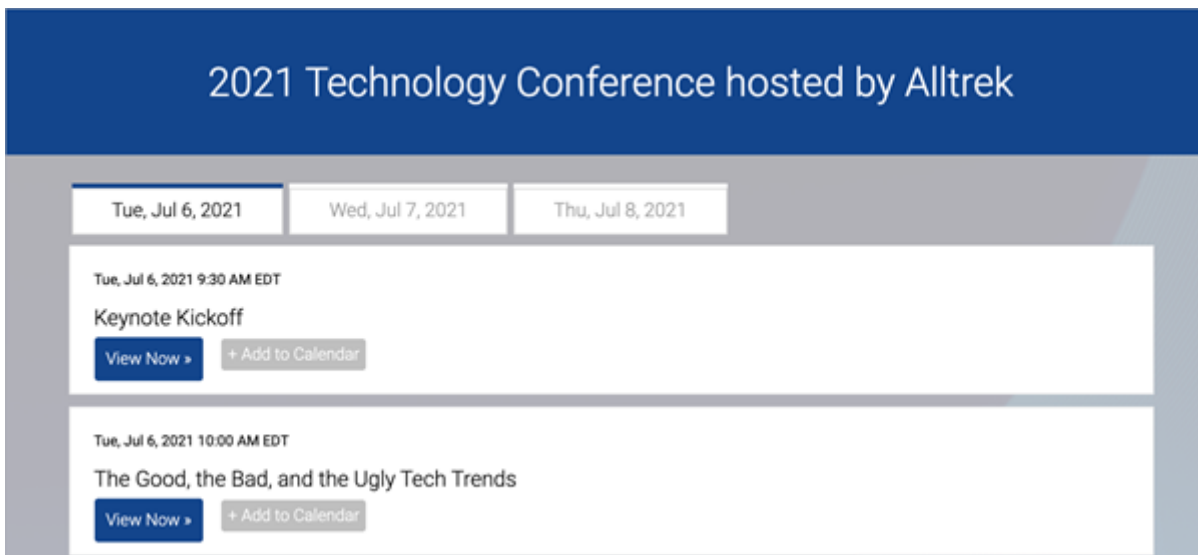


3. Click **Save and Continue**.

## Sort with broadcast date tabs

If your conference takes place over several days, you can automatically group them into tabs with their scheduled date. If the date of an event or breakout session changes, it is automatically sorted into the correct date tab on the portal.

This is an example of a portal with a Tab layout and events sorted into broadcast date tabs.



### To sort events and breakout sessions into tabs by date:

1. On the left panel, click the **Manage Segments** tab.
2. On the Manage Segments tab, click **Manage Categories**.
3. On the Manage Categories window, under Automatic Grouping, select **Broadcast date tabs** and then click **Save**.

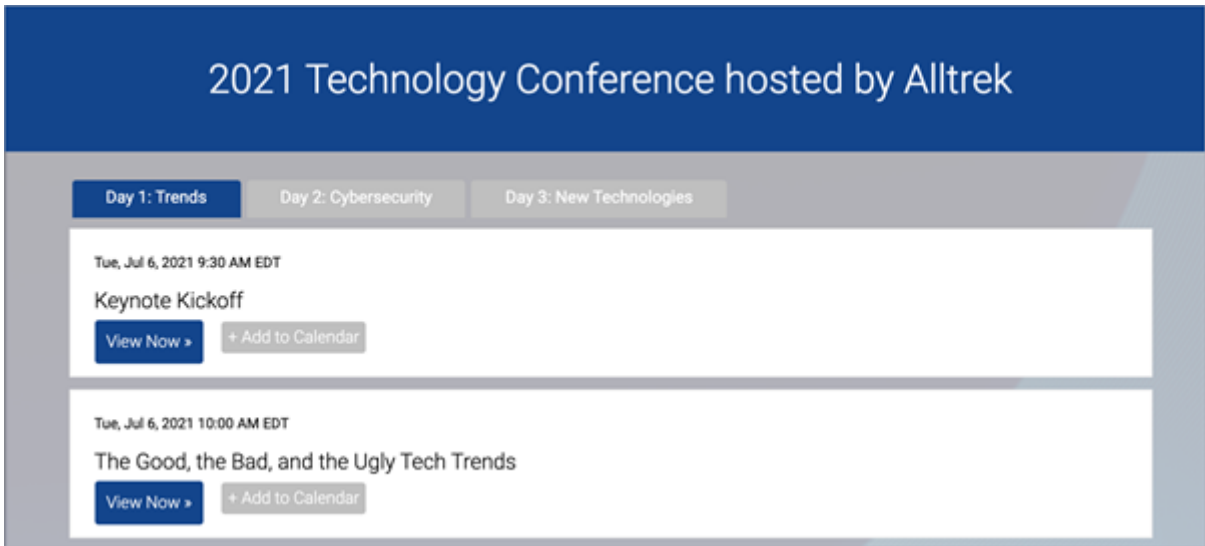
A screenshot of the "Manage Categories" window. At the top left is the title "Manage Categories" with a help icon. At the top right is a "+ New Category" button. Under "Automatic Grouping:", there are three radio buttons: "None", "Upcoming events category", and "Broadcast date tabs" (which is selected). To the right of the selected radio button are a "Prefix:" text input field and a "Date Format:" dropdown menu showing "Thu, Apr 8, 2021". Below these is a table with five columns: "Order", "Category ID", "Display Name", "Show", and "Remove". The table is currently empty. At the bottom center is a blue "Save" button.

4. Then on the Manage Segments tab, click **Save and Continue**.

## Sort with custom categories

Create your own custom categories to separate different conference days, topics, and more.

This is an example of a portal with a Tab layout and events sorted into custom categories.



**To sort events and breakout sessions into custom categories:**

1. On the left panel, click the **Manage Segments** tab.
2. On the Manage Segments tab, click **Manage Categories**.
3. On the Manage Categories window, under Automatic Grouping, select **None**.
4. Click **New Category** and enter a Category ID and a Display Name for each of your categories.

The Category ID is used to assign events and breakout sessions to the category in the Webcast Admin portal and does not display on the portal agenda page. The Display Name is the title of the category that viewers see on the portal.

**Note:** Category IDs can't contain any spaces or special characters.

Manage Categories

New Category

Automatic Grouping:

☒ None

☐ Upcoming events category

☐ Broadcast date tabs: Prefix:  Date Format: Thu, Apr 8, 2021

Order	Category ID	Display Name	Show	Remove
1	Day1	Day 1: Trends	<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>
2	Day2	Day 2: Cybersecurity	<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>
3	Day3	Day 3: New Technologies	<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>

Save


5. Once you've created your categories, click **Save**.

On the Manage Segments tab, a new Category column displays.







6. In the Category column, select a Category ID for each event and breakout session to assign them to categories.

**Note:** You must assign categories to all of your events and breakout sessions for them to display on the portal.

### Manage Segments for 2021 Technology Conference ho... (514698)

[Linked Segments](#) 

[Manage Categories](#) [+ Add Breakout](#) [+ Add Segm](#)

Order	Event ID	Event Name	Event Status	Category	Show	Access	Segment ID	
<input type="text" value="1"/>	514761	Keynote Kickoff	Scheduled for: Tue, Jul 6, 2021 9:30 AM EDT	Day1 ▾	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	 
<input type="text" value="9"/>	514769	Step Up Your Cybersecurity Ga...	Scheduled for: Wed, Jul 7, 2021 9:30 AM EDT	Day2 ▾	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	14	 
<input type="text" value="16"/>	514765	Emerging Markets: Autonomous ...	Scheduled for: Thu, Jul 8, 2021 9:30 AM EDT	Day3 ▾	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	8	 

[« Back to Summary](#) [Save and Continue »](#)

7. After you've assigned your categories, click **Save and Continue**.