Presenter Flow in Zambia

Percy

March 2012

Abstract:

Zambia is a piece of Conference Management Software. This document is a “How To” guide assisting in the way of entering and keeping track of Presenters for the Zambia FFF-branch instance for your conference. This is still a work in progress.

Contents

1. Introduction **1**

2. Entering Presenters **1**
2.1. Ouside Suggestions . . . 1
2.2. By a Liaison person . . . 2

3. Updating Presenter Information **4**

4. Entering Compensation **5**

5. Entering Schedule Elements offered **7**
5.1. Outside suggestion . . . 7
5.2. By a Liaison person . . . 8
5.3. By a Presenter . . . 11
5.4. Associating the Schedule Element with a Presenter . . . 11

6. Choosing Schedule Elements **12**

A. Appendix **A**

List of Tables

1. Web Pages Referenced in this Document . . . A
2. Useful Reports . . . A

List of Figures

1. Brainstorm Suggest Presenter . . . 1
2. Notes On Presenter . . . 2
3. Add Participant . . . 3
4. Administer Participants . . . 5
5. Compensation Update . . . 6
6. Compensation Information . . . 7
7. Brainstorm New Session . . . 8
8. Add New Session . . . 9

1. Introduction

There is a certain pattern to the flow of dealing with presenters, whether they are sought after as Guest Of Honor, or as presenters on specific subjects, or as individuals that people have suggested, and how to get them successfully into Zambia. This section of the documentation will be referencing some things only available to SuperLiaison individuals, so if you do not have that designation, this document might not be very useful to you in terms of work-flow, but it is always good to have an understanding on how things go on. Please do not let that deter you from enjoying this document.

2. Entering Presenters

There are two basic paths for entering Presenters into Zambia, either they are entered via outside suggestion (by someone, possibly the presenter themselves) when the call for presenters is open, or by someone on the Liaison Team entering their information, because negotiations by another channel of communications has happened. If the presenter is already in the system, either said presenter or a member of the Liaison Team can indicate their interest without rentering their data. In this case, go directly to the next section.

2.1. Ouside Suggestions

Depending on your convention, many of the folks who are going to present either applied to do so (once you put the call for presenters) or are recommended by other folk. Either way they will probably have been entered in the Brainstorm Suggest a Presenter form.

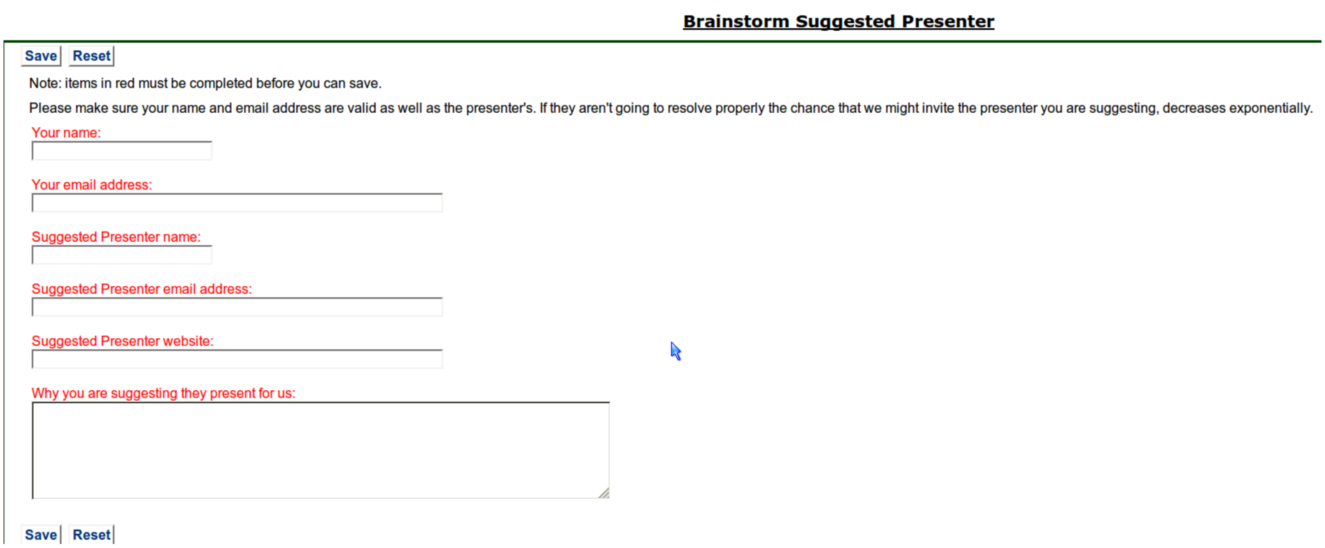


Figure 1: Brainstorm Suggest Presenter

Fortunately or unfortunately, depending on the individual, you might not even have enough information to track them down and invite them but most people are good at putting in the information.

Once presenter information is entered, most of it will be in the “NotesOnPresenter” element, looking much like:

When	Who	What Was Done

Figure 2: Notes On Presenter

The element appears at the bottom of a presenter administration screen.

Hopefully their name and email address will be in their profile should you desire to contact them. Hopefully it will also include the email address of the submitter, so if the information they submitted doesn’t actually connect you, or is incorrect, they will be helpful in facilitating the contact.

2.2. By a Liaison person

Often a Liaison person is tapped to enter in a participant because of negotiations done using other chanels. Entering in the Presenter’s information is slightly more comprehensive on the Enter Participant page which can also be found by going to the “Manage Participant & Schedule” tab, and then choosing the “Enter Participants” link.

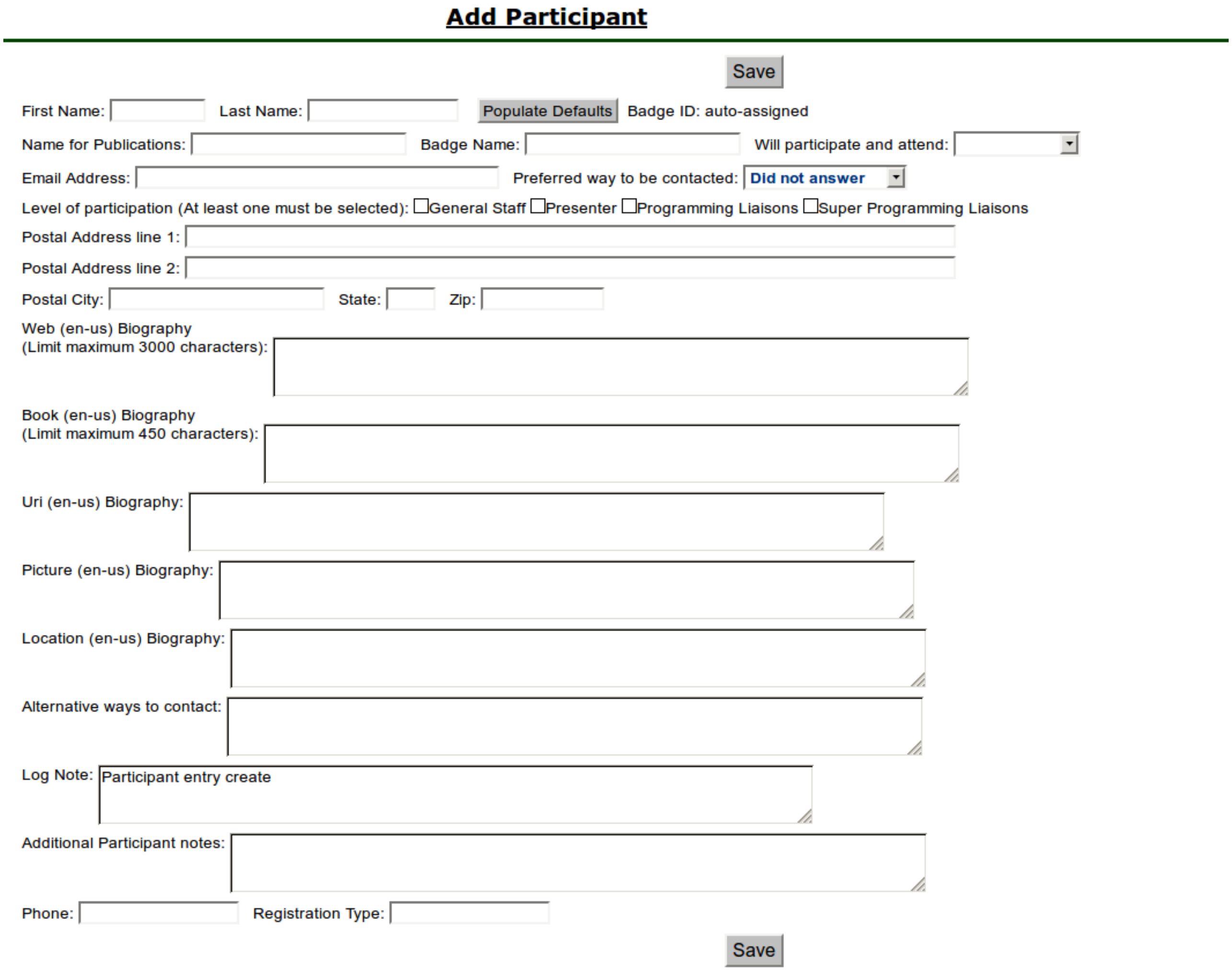


Figure 3: Add Participant

- In the names section, the first name, name for publications and badgename (the last two should be the same) are most important. The last name, although not mandatory, is often useful for disambiguation purposes. The “Populate Defaults” button is mostly useless in our circumstances, being that it simply puts the first and last name in the publication and badge name fields.
- The Will Participate and attend is very useful, but if you don’t know their state it is acceptable to leave that blank for now. Unfortunately that will be problematic going forward beyond the compensation elements, for they won’t show up in the pull-down menues until they are marked as “Yes”.
- It is important for the email address to be all in lower case.
- Depending on the convention, the preferred way to be contacted may be limited.
- Make sure that the “Presenter” box is checked.
- The requirement level of the postal addresses for presenters is convention dependant.
- The Biography elements are all the “raw” elements, i.e., what the presenter themselves can

see and edit. Depending on how your convention is organized, this might also be the final bio or it might have several different stages to go through before it is finalized. The language in parentheses is only useful to note, if your convention is multi-lingual. (e.g., en-us is english, united states, fr-ca is french canadian)
  - Web is the bio shared on the web.
  - Book is what is being put in the convention book.
  - URIs should be in fully-formed link format.
  - Pictures can be locally or remotely sourced.
  - Location should go away soon, don't worry about that.
- The alternative ways of contact is always useful, if the presenters are willing to offer up one or more. These can include other email addresses, contact info for support people, or other ways of being in touch with them.
- The Log Note will also end up at the bottom of your page, with the rest of the Notes On Presenter elements.
- Additional Participant notes are notes that follow their profile around.
- Phone number is for contact, but depending on the strictures of your convention this might or might not be required.
- Registration Type currently is a fill-in field that should be filled in with 'PresenterComp" but will become a pull-down list at some point.
- Don't forget to hit the "Save" button, please.

3. Updating Presenter Information

Once in the system, the most common request by presenters is to have their password reset so that they can update the rest of their profile. To do this, go to the Administer Participants link under the Manage Participants & Schedule tab. Select the presenter from the drop-down menu and, once selected you may change their password, their interested and available setting, and their published name.

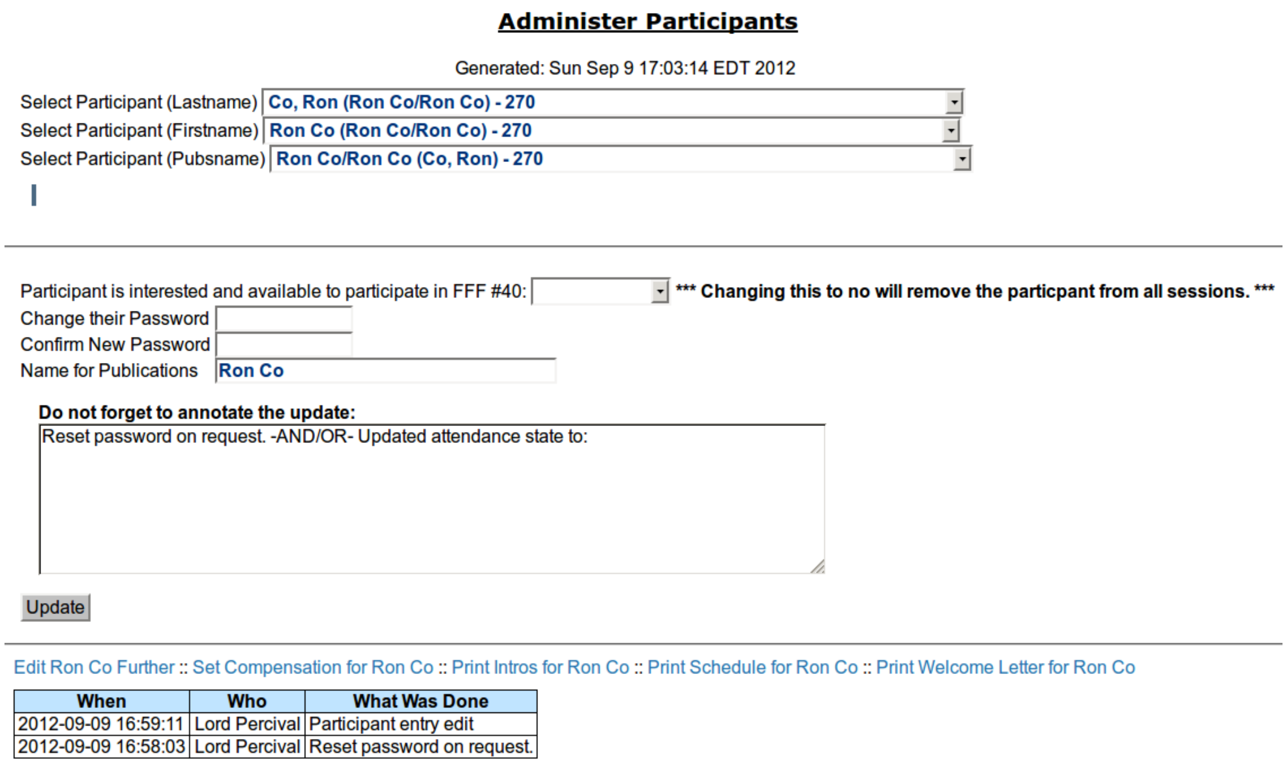


Figure 4: Administer Participants

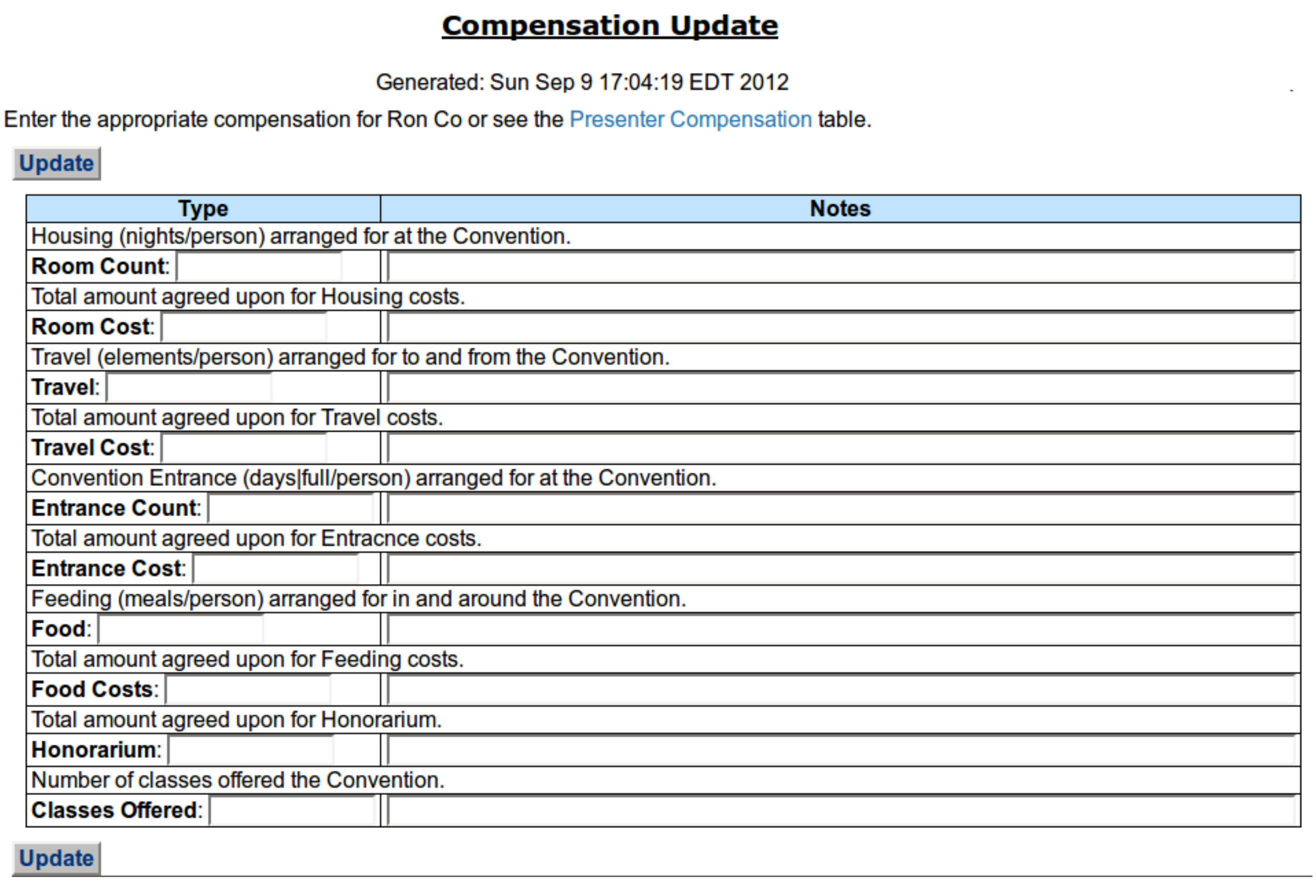
Most of the other modification pages won't have the presenter in the select menu until they are marked as a "Yes", as previously explained. This is one of the pages that all the potential presenters are available in the pull-down menu. If they are not available here, they might still be in the system, just not marked as someone you can see. If you think they should already be in the system, and aren't showing up, please check with someone with greater permissions, or other div-heads. They may already be in the system, just under another division.

At the bottom of the Admin Participants page, there are several different links. The next-most useful page is the first one: "Edit PUBNAME further". When using the direct link, you will need to reselect the participant from the top of the page.

This link will take you back to the page you should be familiar with, when you were creating the participant. You can add to or change any of the extant information at this time. If you want to see the importance of the fields, please see section on StaffEditCreateParticipant.php for diagram and instructions.

4. Entering Compensation

There are two ways to reach the place to enter Compensation for a Presenter. One way is to go to the bottom of the Admin Participants page mentioned in the last section, then select the second link: "Set Compensation for PUBNAME". When using the direct link, you will need to reselect the participant from the top of the page.



Compensation Update

Generated: Sun Sep 9 17:04:19 EDT 2012

Enter the appropriate compensation for Ron Co or see the Presenter Compensation table.

Update

Type	Notes
Housing (nights/person) arranged for at the Convention.	
Room Count:	
Total amount agreed upon for Housing costs.	
Room Cost:	
Travel (elements/person) arranged for to and from the Convention.	
Travel:	
Total amount agreed upon for Travel costs.	
Travel Cost:	
Convention Entrance (days|full/person) arranged for at the Convention.	
Entrance Count:	
Total amount agreed upon for Entracnce costs.	
Entrance Cost:	
Feeding (meals/person) arranged for in and around the Convention.	
Food:	
Total amount agreed upon for Feeding costs.	
Food Costs:	
Total amount agreed upon for Honorarium.	
Honorarium:	
Number of classes offered the Convention.	
Classes Offered:	

Update

Figure 5: Compensation Update

Only fill in the applicable compensation fields. Please don't forget to hit "Update" before leaving the page. Compensation is very conference dependant, please make sure any compensation entered is in lines with your conference's policies.

You can also select the presenter name from the Presenter Compensation table.

Compensation Information

Generated: Sun Sep 9 17:05:24 EDT 2012

Here is all the compensation entered for all the people.

To change someone's compensation, click on their name.

With Notes :: Print with notes :: Print without notes :: csv with notes :: csv without notes

Presenter	Attending	Room Count	Room Cost	Travel	Travel Cost	Entrance Count	Entrance Cost	Food	Food Costs	Honorarium	Classes Offered
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
TOTALS:		12	1920	2	650	2	60	0	0	800	13

Key
Room Count: Housing (nights/person) arranged for at the Convention.
Room Cost: Total amount agreed upon for Housing costs.
Travel: Travel (elements/person) arranged for to and from the Convention.
Travel Cost: Total amount agreed upon for Travel costs.
Entrance Count: Convention Entrance (days|full/person) arranged for at the Convention.
Entrance Cost: Total amount agreed upon for Entracnce costs.
Food: Feeding (meals/person) arranged for in and around the Convention.
Food Costs: Total amount agreed upon for Feeding costs.
Honorarium: Total amount agreed upon for Honorarium.
Classes Offered: Number of classes offered the Convention.

Figure 6: Compensation Information

This table will fill in with the information entered. The notes display makes it a very big table, hence the option without notes is the default.

5. Entering Schedule Elements offered

There are a few ways that Schedule Elements get entered into Zambia. A Schedule Element is anything that might end up on the schedule. This could be an Author Reading, a performance, a hosted meal, a class, a panel, a keynote speech, or anything else that is schedule worthy.

The information entered is visible to anyone who chooses to look at the website. So people interested in what the decision process might be, or are looking to see if what they proposed is already under consideration, they can see much of the information. This gives the community some sense of what is going on, so being descriptive about the information entered is a good thing.

Once a Schedule Element is entered, if it is to be associated with a particular individual or set of individuals, that is done in several ways.

5.1. Outside suggestion

The Schedule Elements entered in from the outside, or by a presenter themselves, will have certain fields filled in, but not others. Hopefully the submitter has given sufficient information in the form for you to determine if the Schedule Element is worthwhile, appropriate, or fits within this particular event. They might have also suggested a specific person for the Schedule Element. The information asked for should be fairly straight forward. This is found on the Brainstorm screen under the Suggest a Session tab.

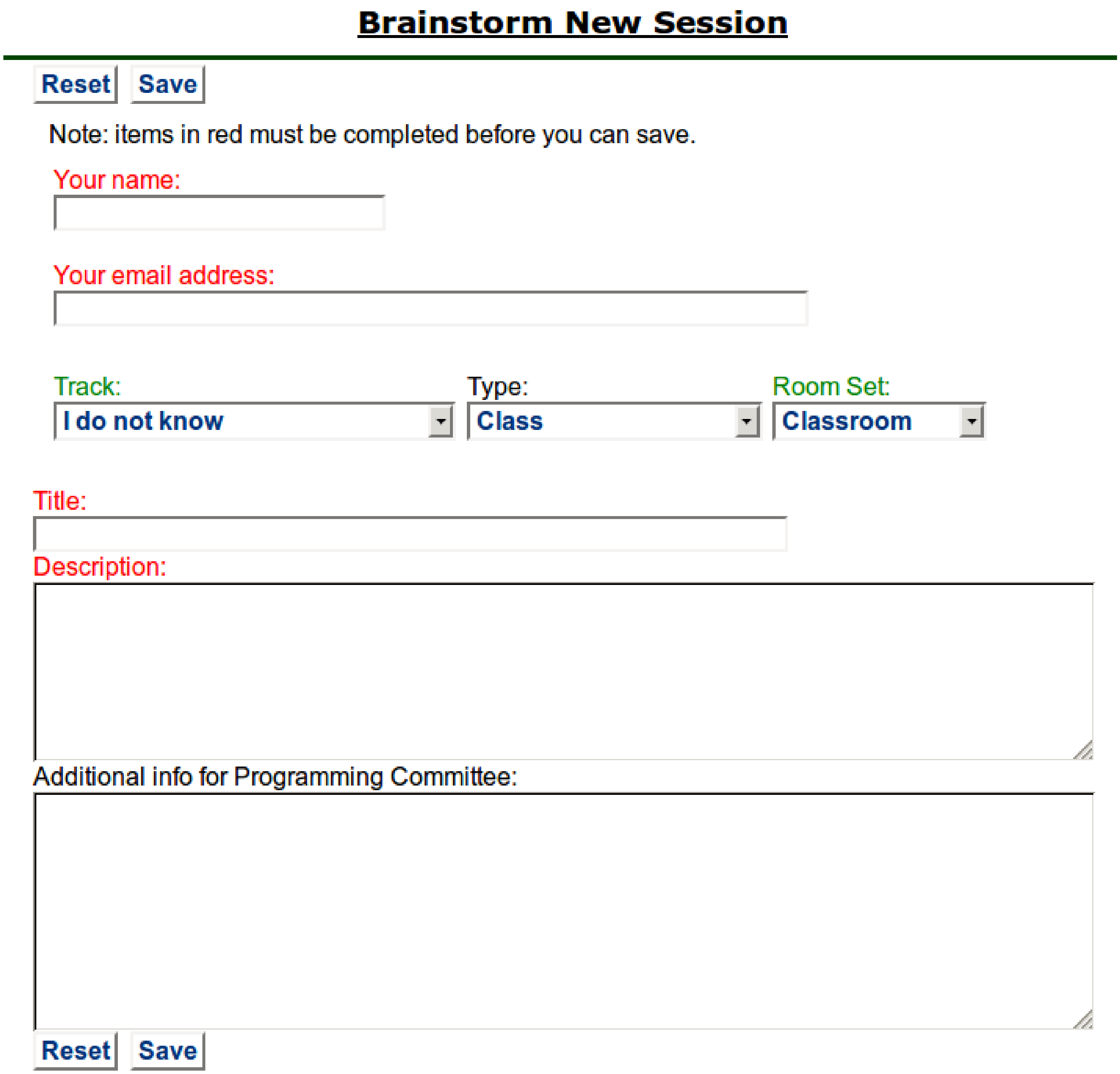


Figure 7: Brainstorm New Session

5.2. By a Liaison person

This form isn't overly complex, but there are some very important pieces here. This can be found from the "Create a New Session" link under the "Manage Sessions" tab.

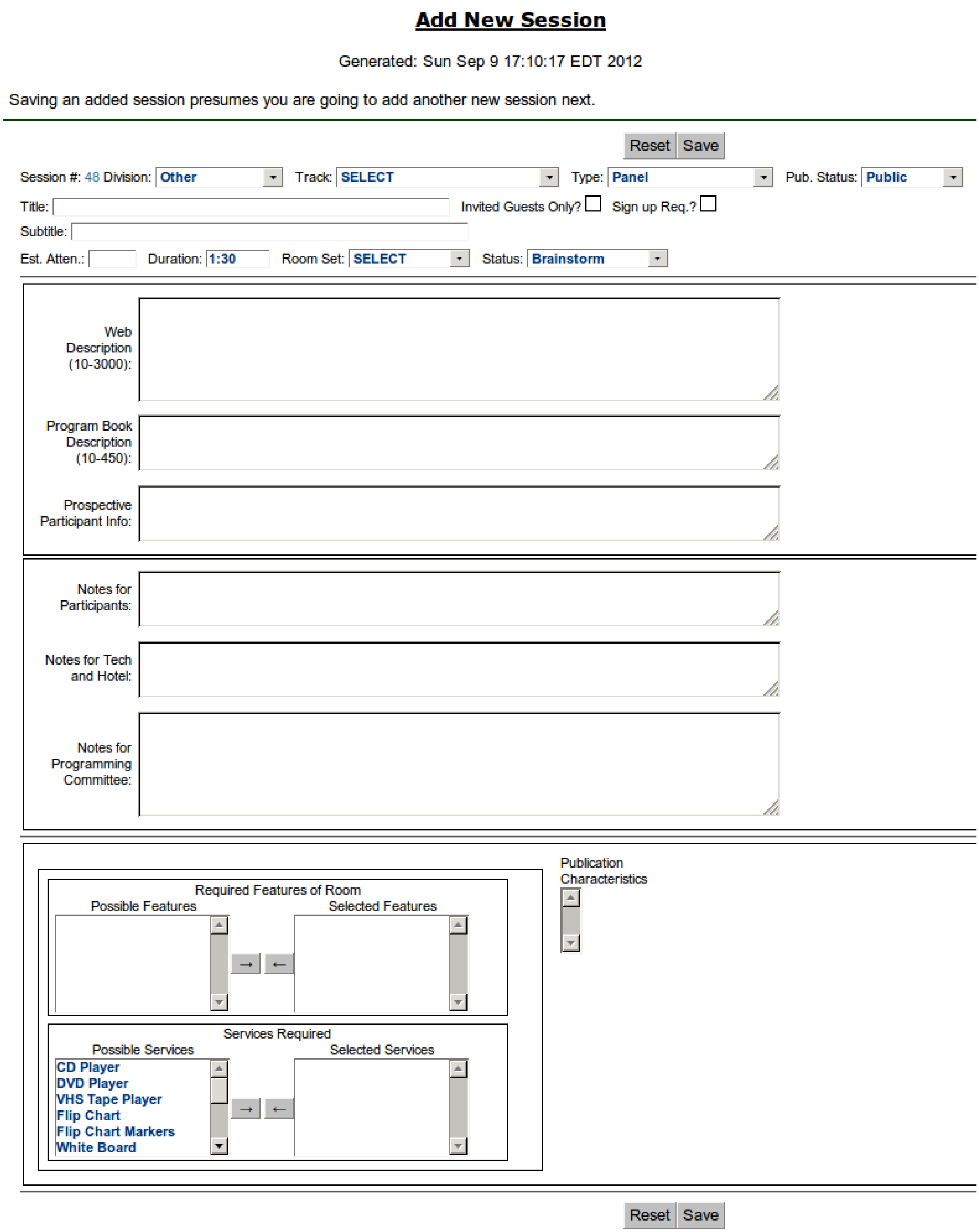


Figure 8: Add New Session

- The session number is just there for reference. If the next step in your flow is to directly assign a person to a session, then note down the number for future reference (the next section).
- Division: Most probably going to be “Programming” but other options are available.
- Track: Finding the appropriate track is sometimes tricky if it falls into multiple categories. You may want to set this to some variant of “General”, or “I don’t know”, depending on the decision of your particular convention.
- Type: What type of offering it is. Often “Panel” or “Class” but might be something else.
- Pub. Status (Publication Status): Describes if it is closed to a certain set of people, or only interesting to them, but most often will be “Public”.
- Title and Subtitle: Some conventions have limits on the length of these, and how they are published.
- Invited Guests Only: If this is going to be given by a pre-scripted specific person, or set of people, this should be checked, so other presenters cannot sign up to present for this Schedule Element. If it is unchecked, when Presenters look for the list of Schedule Elements they are able to sign up for, this Schedule Element will be amongst them. This effects weather the Prospective Participant Info below, is seen.
- Sign up Req.? (Sign up Required): This is in place in case any particular Schedule Element requires pre-con sign-up.
- Est. Atten. (Estimated Attendance): This should be left blank, since it is part of the feedback and history of the Schedule Element after it is given.
- Duration: This might be set by the convention, or might be dependant on the Schedule Element, type of Schedule Element, or many other things. There should be a default time set here by your convention. This may or may not contain the break between Schedule Elements, again depending on the decision of your particular convention.
- Room Set: Most room-sets will be standarized by your convention, but sometimes a presenter has a particular preference that can be accommodated. Most often “class room”, “theater”, or “unspecified” will be your choice.
- Status: If you are just entering the Schedule Element, and it has not been previously negotiated as a Schedule Element that has been confirmed, please set it as “Brainstorm”. If it has been accepted as definitely happening, “Vetted” is the level it should be set to.
- Web Description: This is the description of the Schedule Element that will be on the website, once it is scheduled. It is shared with the Brainstorm page until then. Because of this, please enter an accurate description of the Schedule Element. There may be length constraints (on both ends) for the description.
- Program Book Description: This is the description of the Schedule Element that will end up in the publications. It doesn’t need to be entered immediately (especially if the Schedule Element has not yet become “Vetted”). There are probably has greater restrictions on the length, due to the web costing less for space than publications do.
- Prospective Participant Info: This information gets shared with all the Presenters, if the Schedule Element is not restricted by the “Invited Guests Only” checkbox being checked. This information is available in the area where Presenters may choose to sign up for this Schedule Element. Things like “need at least three years experience in the publishing field, from the publisher’s point of view” or the like would go in this field.
- Notes for Participants: If you have yet to assign the Schedule Element to someone in the system

who has said “Yes”, then their name should be put in this field. When Schedule Elements are actually vetted and scheduled, then this field should be any particular notes that will be shared with the presenter or presenters, in their schedule.

- Notes for Tech and Hotel: This is any of the notes that will go to logistics, beyond the Features and Services requests below. Like “will need to shift around the table, with the assistant on it, in the middle of the class”.
- Notes for Programming Committee: If this was a Schedule Element submitted via the Brainstorm Submit a New Session (see above) then any notes not specifically in the Schedule Element description end up here. If you want to put commentary here, notes about the Schedule Element, why it was requested, who saw it elsewhere, if it fits into multiple tracks, or the like, this is the place to make such notations.
- Features and Services: These are pick-lists that you can choose various features of the room, or services that should be provided for the room, for the paricular Schedule Element. Everything from a CD Player to a Flush Toilette should be covered here. If it isn’t covered here, add it to the “Notes for Tech and Hotel” above. Should it be a regular enough addition, it will probably be added to the select boxes here.
- Publication Characteristics: Originally a hold-over from before, but might now be used to indicate an expanded track conception of the Schedule Elements, for multi-tracked elements.
- Please, do not forget to save your work, or you will be unhappy.

5.3. By a Presenter

The presenter is taken to the outside suggestion section and asked to fill out the form there. It will have their name associated with it directly, as opposed to “Idea Suggestion” as the suggesting individual. This will allow for the association between them and the Schedule Element to be clean and fast.

5.4. Associating the Schedule Element with a Presenter

Most conventions only want to assign Presenters to Schedule Elements, after said element has become vetted, but not all convetions work that way.

If you want to assign a particular Schedule Element to an individual or group of Presenters, make sure said individual or group have already been set to “Yes” in terms of being willing to present for your convention. The next step is to find the Schedule Element in question.

One way is to look under the “Manage Sessions” tab at the View All Sessions link. Find the Schedule Element, then select the link provided by the number (not the title).

A second way is also under the “Manage Sessions” tab, using the link “(Precis View With Links)”. Find the Schedule Element, then select the link provided by the number (not the title).

A third path to the Schedule Element in question is still under the “Manage Sessions” tab. Enter the noted session id number in the “Session ID:” box at the bottom of that screen and hit the “Search” button. This should bring up just one record (the record that you are expecting, hopefully), again simply select the link provided by the number (not the title).

The fourth and fifth path presume that you have already marked the class as “Vetted”, otherwise it will not show up for either of these.

A fourth path is still under the "Manage Sessions" tab, using the "Edit an Existing Session" link. Not only will this allow you to select your Schedule Element from the pull-down list of possible Schedule Elements and edit the information that might have changed since it was submitted, but also if you select the link provided by the "Session #" number, you will be in the right place.

A fifth path is under the "Manage Participants & Schedule" tab, using the "Assign participants to a session" link and choosing the Schedule Element from the pull-down menu at the top of the page.

Once you are on the "Assign Participants" page with the correct Schedule Element, go to the bottom of the page where the "Assign participant not indicated as interested or invited." pull-down menu is located and select the presenter applicable then hit the "Add" button. The presenter will now show up with their "Assigned" box checked. If this particular Schedule Element has had other presenters invited, or had other presenters expressed interest in being part of this particular Schedule Element, that individual will also show up here. They might have their Assigned box checked or not, if that Schedule Element has been associated with that individual.

6. Choosing Schedule Elements

Once all the potential Schedule Elements are in place, then comes the delight of choosing which elements will be part of your convention, when they will happen, and which will have to be left for other conventions. This is mostly dependant on the path of each convention, and is therefore outside the scope of this document to dictate. There are several useful reports that might help with this process, listed in the appendix.

A. Appendix

Table 1: Web Pages Referenced in this Document

Page Name	Link	Description
Suggest A Presenter	BrainstormSuggestPresenter.php	Used by non-con folks to suggest Participants.
Create Participant	StaffEditCreateParticipant.php?action=create	Used to create a Participant from scratch.
Administer Participant	AdminParticipants.php	Used to set the password, attendence state, and pubsname only.
Edit Participant	StaffEditCreateParticipant.php?action=edit	Used to update a Participant's information.
Edit Compensation	StaffEditCompensation.php	Used to edit a Presenter's compensation package.
Presenter Compensation	PresenterCompensation.php	Used to display the compensation for all presenters compensated.
Suggest a Session	BrainstormCreateSession.php	Used by non-con folks to suggest Schedule Elements
Create a New Session	CreateSession.php	Used to create a Schedule Element from scratch.
Assign Participants	StaffAssignParticipants.php	Used to connect a Participant to a Schedule Element

Table 2: Useful Reports

Report Name	Link	Description
View All Sessions	genreport.php?reportname=ViewAllSessions	Shows all sessions, regardless of their status.
Session Notes	genreport.php?reportname=sessionnotes	Interesting info on a Session for sessions whose status is one of EditMe, Brainstorm, Vetted, Assigned, or Scheduled.
Picky People	genreport.php?reportname=conflictpickypeople	Show who the picky people do not want to be on a panel with and who they are on panels with.
Too Few People	genreport.php?reportname=conflictunder3assigned	Scheduled sessions in division Program: If these are panels, you need at least 3 people. Other types require at least 1.
Assed V. Sched	genreport.php?reportname=conflictschedassn	These are sessions that are either in the grid and have no one assigned or vice versa.
Double Booked	gdenreport.php?reportname=conflictpartdup	Find all instances where a participant is scheduled to be in two or more places at once.
# of sessions	genreport.php?reportname=conflictpartnums	Compare number of sessions participants requested with the number of which they were assigned.

In point of fact, there turned out to be too many of them, for this sampling to be useful. Please check the Conflict Reports and the Prog Reports Indicies on the Available Reports page.