**Process for Assigning Time Slots and Recording Waiting List Orders**

# Cvent report downloads

1. Export from Cvent the **Registered (No Waitlists)** saved report and the **Waitlists Report** saved report (export these as CSV files so you don’t need to reformat cells).

*This is already automated. However, a few things to automate further:*

* *Check for any missing or invalid emails and correct*
* *Check for any mobile numbers that aren’t 10 digits*
  + *Flag if international and leave in*
  + *Anyone else, fix or clear to missing 🡪 Can email later to get info to update*
* *Each time pull in updated info, only pull in new rows (e.g., use registration date/time and last name to pull out new rows)???*
* *Does somebody who initially selected a waitlist spot, but who we later give an actual spot to (and collect their payment), end up changing which report they’re output in, or is that something we’ll have to manually account for? If so:*
  + *Add in code manually to remove any waitlists who are no longer waitlisted from the ‘Waitlists report’ when it’s first brought in, and also add in their details manually to the ‘Registered (No Waitlists)’ report.*
  + ***If a waitlisted person gets a spot and pays for it up to three weeks before the conference, they’ll be on the Registered (No Waitlists) report from Cvent with the critique/pitch spot assigned to them; they’ll no longer appear on the Waitlist report. If a waitlist spot opens after the Cvent reports are run for the purpose of scheduling individuals at specific times with their selected guests (or assigned guests in the case of query letter critiques), those changes must be made manually to the resulting Excel spreadsheets.***

***Additional datasets*** *that we need to manually create to enable easier automation later:*

* *Dataset with the list of timekeepers, and any additional information about them (for instance, requests for which agents’ room, or if they want to be near any other volunteer, etc.)*
* *Dataset with the list of agents and editors, and the fiction and nonfiction genres they represent – and any mobility or other issues worth noting*
* *Map of the conference center floor and room names*
  + *How do you decide which agents/editors to put where? Do you group some by genre (fiction vs non-fiction), etc?*
  + ***I assign them to meeting rooms alphabetically by last name, starting with Board Room 1-6 then Riverdale Room then Fayetteville Room (covering all the rooms in that hall). On Friday, the query letter critiques involve pairs of agents/editors so we need 9 rooms total; that hall only gives us 8, so we need one more room: I put the 9th group in the Dogwood Room in the other long hall (Peachtree City Room, which is closer to the Board Room hall, is used by the book fair participants on Friday).***
  + ***On Saturday, I follow the same process, assigning rooms starting with Board Room 1 and then Peachtree City Room in the atrium and then Dogwood Room, Gardenia Room, Jasmine Room, Magnolia Room, Cherokee Rose Room, Atlanta IV Room, Atlanta III Room, Atlanta II Room, and finally Atlanta I Room (basically walking up the left side of the corridor to the end and then walking back down the right side).***
* *List with time slots for Friday*
  + ***See page 6-13 as to whether these are 15-minute intervals or 12-minute intervals.***
* *List with time slots for Saturday*
  + ***Always 15-minute intervals for ms critique and pitch meetings.***

*Questions:*

* *When/how often should it be downloaded?* 
  + ***I download the Cvent reports 3 weeks before the conference to start the process of assigning meetings for query letter critiques, ms critiques, and pitches, and to fill out the rest of the time/location information for the other sessions so the schedules can be emailed to participants two weeks before the conference.***
* *How quickly does this registration become “full” after it’s opened?*
  + ***The ms critique and pitch spots for some guests fill up faster than others, but all these spots will be full by the time the Cvent reports are downloaded for scheduling purposes.***
* *If you download it once and then things change, how do you keep track of this? Do you just pull in the newer records/rows?* 
  + ***Once I download the Cvent report, that Excel file (downloaded as a CSV and then converted to an XLSX when I save it to my computer) becomes the master file that all changes are made to. When someone new registers, I get an email showing me what they registered for, and I add them manually to the Registration Excel file. Ditto for the Waitlist CSV. I could download a report, find the new rows and copy and paste them into the Excel, but it’s usually quicker to copy and paste from the email. If someone moves from a waitlist to a guaranteed spot, I update the Registration Excel file and Waitlist CSV and usually don’t bother with updating Cvent, but if this will disrupt what you have in mind, I can keep Cvent up to date too.***
* *How do you identify people who have mobility issues on the guest end? Could we add this as a question to the registration sign up?*
  + ***The mobility issues only come into effect when we were in a hotel with stairs separating some meeting rooms from others; it’s not the case at the Westin. Every once in a while, a registrant will write to me requesting accommodation in the College Park Ballroom because they’re hearing impaired and need a spot upfront or they’ll be in a wheelchair and need space cleared of chairs in that ballroom. These situations don’t affect the agent/editor meetings.***
* *Say someone signs up for a waitlist spot originally, but a spot opens and we give it to them… Do they continue to show up in the waitlist reports only ever time, or is there a way to update this in Cvent before we even output the two reports?*
  + ***If a waitlisted person gets a spot and pays for it up to three weeks before the conference, they’ll be on the Registered (No Waitlists) report from Cvent with the critique/pitch spot assigned to them; they’ll no longer appear on the Waitlist report***

# Waitlist report

1. For the Waitlists Report:

*My suggestions:*

* *For the manuscript critiques:*
  + *We’ll output all the manuscript critique rows to its own dataset.*
  + *Sort by guest (e.g., Agent/editor), Registration date and email, then delete any duplicate rows*
  + *DATA QUALITY CHECK: Make sure nobody has more than* ***3*** *wait lists for manuscript critiques* ***[ updated]***
* *For the pitches, book fair and query letters:*
  + *For the pitches, book fair and query letter critiques, we’ll also output to its own dataset and transform it so that instead of A, B, C we replace with ‘Waitlisted’, and instead of 1st and 2nd in Query Critiques, we change to just ‘Query Letter Critique’.*
  + *Sort by Item, Registration date and email, then remove duplicate rows, then order each waitlisted person by Item according to Registration date*
  + *DATA QUALITY CHECK: get the frequency of every first/last name that appears on the wait list, to ensure that no one has more than 3 pitches, 1 query letter critique, and 1 book fair waitlisted spot.*
  + *Rename the item name to ‘Pitch - #1 on waitlist’ (e.g., concatenate the Item name and the waitlist queue number).*

*NOTE: All of the above can just be run continuously/whenever. Just rerun the code each time to obtain the new outputs. 🡪 We just need to check for what happens if someone is a waitlist that we move to an official spot…*

* *If the above happens, we may need to add in code, as shown in orange*
  1. Cut the Earlier & Later Manuscript Critique rows and paste them into a separate sheet (in case you want to assign somebody to a specific query letter critique team because they missed out on the MS critiques), leaving only the pitches, book fair, and query letter critique waitlists.
  2. Do a Find-and-Replace to substitute “A,” “B,” and “C” with “Waitlisted” before “Pitch” and add “Waitlisted” in front of any Query Letter Critique and Book Fair listings.
     1. For the 2nd Query Letter Critique, delete any with a 1st Query Letter Critique, too, change the dates for these to come after the last 1st Query Letter Critique waitlist, and change the name to Waitlists 1st Query Letter Critique (now they’ll sort in order still).
  3. Data sort on the Agenda Item Name and also the Registration Date (GMT). This will blend the earlier and later rows for each agent/editor, ordering the queue according to registration date and time. Scroll through the resorted list and delete any duplicate names for the same agent/editor (i.e., where someone got on a waitlist for the A, B, and/or C Pitch with the same person).
  4. For each row, relabel the first column according to its rank (#1, #2, #3, etc.) in that waitlisted queue according to the time stamp (e.g., Waitlisted Pitch with Kaela Myers - #1 in queue)—you’ll copy and paste that into the Registrant file—this will enable you to keep track more easily.
  5. Do the same with the Book Fair and Query Letter Critique, if any waitlists for these.
  6. Re-sort the data by email address. For each row, copy the e-mail address and do a Find to determine how many times that person appears on the waitlist (max of 3 Pitches and 1 Query Letter Critique, 1 Book Fair). Then go to the Registrants exported report, sort the data by email address, and do a Find on that e-mail address.
  7. Create one new row for that individual for each time s/he appears on the waitlist and insert all the info from another of that person’s rows.
  8. In the Agenda Item Name column, substitute information from the Waitlist Report about who s/he has a waitlisted pitch with and her/his # in the queue. For example:

|  |  |
| --- | --- |
| Waitlisted Pitch with Annie Hwang - #2 in queue |  |
|  |  |

* 1. Temporarily highlight each registrant on the waitlist as you do steps g through i to keep track of who you’ve done. Then redo the Waitlist file sort by Agenda Item Name and Registration Date (GMT) so you can add any new waitlist registrations to it.

# Registered (no waitlist) report

1. For the Registered (No Waitlists) report, the first step is to:

* Scroll through looking for two things to correct:
  + blank e-mail address cells—this will only occur when someone added a guest but didn’t specify an e-mail address. In those cases, insert the primary participant’s e-mail in the blank spot.
  + Mobile #s that don’t follow the 10-digit format; correct those that include spaces, dashes, etc. and contact anyone with a number that has too few or too many digits (if they have an international number leave it alone)
* Data sort on the Agenda Item Name and delete all columns except First and Last Name, E-mail, Mobile Number, Hotel vs. Zoom, and the Fiction/Nonfiction Genres; no other columns are needed.
* To find the Pre-conference Edits, keep the data sorted on Agenda Item Name and delete those rows. If someone only did the Prep Critique, this will delete them entirely because they can’t attend the free activities at the conference—those are only available to those who paid for two or more activities.
* **If you allowed 3rd query letter critiques, do a sort on Last Name, First Name, and Agenda Item Name and add those rows to the registration sheet now.**

*Suggested:*

* *We already do the data cleaning above as our very first step*
* *DATA CHECK: Does anybody have 3 query letter critiques?*
* *Create a list of participants (first, last name, email, registration date) who signed up for the Friday workshop 🡪 output to its own dataset*
* *Create a dataset with one row per person (First, Last, Email, Registration Date), where each person has a ‘Chosen Editor’ and ‘Chosen Agent’ column, which captures the agents and editors they chose for their pitches or manuscript critiques (if any).* 
  + *Using this dataset, remove duplicates by person (e.g., create a temp dataset that only has one row per person, with their chosen editors and agents) and then tabulate the frequency of each unique combination of agents and editors in this dataset.*
  + *If even representation of editors and agents, keep only the frequencies for agent-editor combos. If uneven representation, keep the editor-editor or agent-agent combinations, as relevant.*
  + *Save the above as its own dataset for later*
* *Create another dataset (one per participant) and tabulate the frequency of fiction and non-fiction genres among our participants, to get a sense of which ones are most common. Save this dataset as well.*
* *Output the registered report to a new dataset:*
  + *Filter so we drop the following Items:*
    - *Pre-conference edits*
    - *Award ceremony and prize giveaway*
    - *Book fair*
    - *Friday check-in*
    - *Saturday check-in*
    - *Friday mini seminars*
    - *Saturday morning mini seminars*
    - *Friday night mixer*
    - *Friday publisher QA*
    - *Saturday Agent QA*
    - *Friday workshop*
    - *Saturday afternoon mini seminars*
  + *Keep only the following columns:*
    - *First name*
    - *Last name*
    - *Email*
    - *Mobile*
    - *Hotel vs zoom*
    - *Fiction genres*
    - *Nonfiction topics*
    - *Registration date*
* *Link back to the dataset per person with each of their chosen editors and agents, so that (even though each person might have multiple rows in the registered report dataset) there’s the two added columns ‘chosen agents’ and ‘chosen editors’, which will be identical for each of that person’s rows. Also add in the ‘Friday workshop flag’ variable (1=registered, 0= not).*

Next To-Do Activities:

* Open “Schedule Template for Qry Ltr, MS Crit & Pitch Times” from the previous conference’s Conference Schedules folder, save it to the same-named folder for the current conference, and print a copy to have the timeslots at hand.
* Assign the timeslots for the query letter critique based on who is doing the critiques and pitches on Saturday and who is also attending the workshop, to avoid overlapping activities—see below.
* Assign the timeslots for the Saturday manuscript critiques and pitches— instructions for this follow Query Letter Critique instructions.

## Friday Query Letter Critiques

### Identify agent-editor pairings and assign rooms

For Query Letter Critiques:

1. Let’s figure out the timeslots for the Friday Query Letter Critique. Start by creating a new tab called “Friday Query Letter Critique” as a worksheet to figure out who to assign to which panel and when.
2. From the main tab, copy all and paste into the new tab. Sort on Email Address and Agenda Item Name (for consistent listings of the rows).
3. Go through each participant and delete all their rows if they do NOT have “Query Letter Critique.” To make these easier to spot, sort on Agenda Item Name and then Last Name and First Name. Highlight those rows (and only columns A-E) for the max. of **96** (if you have 16 guests: 8 pairings times 12 spots) or **108** (18 guests: 9 pairings times 12 spots) Query Letter Critique spots. Now, data sort the file on Last and First Names. Next, do a find on “Query Letter Critique” and go through the rows, eliminating those participants who don’t have this in their listing. After reaching the bottom, do a data sort on Agenda Item Name just to be sure there are 96/108 “Query Letter Critiques” (assuming all spots were filled) and one wasn’t accidentally deleted. Then un-highlight all rows. Now highlight all rows for the Friday workshop so those will be easy to spot and do the data sort again on Last and First Names and Agenda Item Name.

*Suggestion:*

* *As mentioned above, we will make a dataset with the agent/editors’ fiction and non-fiction topics. These categories should exactly match those that participants could select upon registering. If there’s any categories the agents/editors mention that we didn’t ask participants about, ignore them.*
* *Filter the dataset to only rows containing the Friday Query Letter Critiques 🡪 output as new dataset*
  + *Maybe merge with the agent/editor info, so that there’s a bunch of columns (one per editor and agent) with 1= match, 0= no match kind of thing?*
* *DATA CHECK: The total number of rows should equal the number of editors/agents/2 multiplied by 12 time slots. If this isn’t the case, possible reasons:*
  + *Registration isn’t fully filled up yet 🡪 but if this is the case, there shouldn’t be any waitlists for this activity, so double check that*
  + *There are duplicates; delete/deal with them.*
* *Review the combination frequency output we created earlier, to see the most common combinations of agent-editors. Also review the combination frequency output of the most popular fiction and non-fiction genres among our participants.*
  + *Using these, decide on the agent-editor pairings (prioritize pairing of high-freq pairings), and then check to ensure that their combined fiction and non-fiction genres (for all agent-editor pairs combined) matches up reasonably with the more popular fiction and non-fiction genre combinations.*
    - *Include waitlisted participants too!*
  + *Assign them to a room; also assign a timekeeper (based on who the timekeepers said they wanted to volunteer for)*
    - *May want to create a filtered dataset just of the timekeepers who have paid activities, to ensure assignments make sense.*
  + *Create a new dataset with the agent-editor pairings, their combined genres, and their assigned rooms.* 
    - *With this dataset, also create a “rank” variable, where each editor-agent pairing gets ranked 1 through the total number of pairings according to how well they capture the more to less common genres among participants. For instance, if an agent-editor pairing ONLY has a combined “YA” and “Fantasy” pairing, figure out how many participants would be captured by this pairing (e.g., the number of participants who said “YA” OR “Fantasy”). This way we rank the agents by most generalist (=1) to most specialist (=max). This ranking variable will be used later so that, for each time slot we iterate through, we start filling that time slot for the most specialist agent-editor pairing first, then most generalist.*

### Assign participants to relevant Friday timeslots

1. Those who have “Query Letter Critique” and “Friday Workshop” must be scheduled between 1:45 and 4:00 to avoid activity overlap, so highlight the rows of those who do NOT have both of these activities—you need at least 32 (8 pairings times 4 slots)/36 (with 9 pairs) to fill the 4:00 to 5:00 slots in order to give 15 minutes per slot (highlight these with a color). Remember that a person with two query letter critiques who is NOT also doing the workshop counts twice, as they’ll be filling two timeslots between 4:00 and 5:00. Those doing the critique and workshop will go in the 1:45 to 4:00 slots. Even more importantly, those who have “Query Letter Critique” and MS Critiques and/or Pitches on Saturday cannot be assigned an agent/editor panel that has anyone they’ll meet with on Saturday. If someone has the Query Letter Critique and the Workshop, but is NOT scheduled for the MS Critique or Pitch sessions, highlight these in a different color (you can assign them to any pairing prior to 4:00 so fill in with the pairings that get the most combination hits as these are the toughest to avoid conflicts with participants doing MS critiques and pitches); **do this before assigning the differently highlighted ones**).
2. What if too many query letter critique participants also signed up for the 4:00 workshop (i.e., you have fewer than 32 who can be placed in the 4:00 slot or later)? You can shave two minutes off each timeslot (from 15 minutes to 13), such that only 24 participants (8 pairings times 3 slots) will be needed to fill the (now) 3:57 and later slots.

* *Assign participants to relevant agents/editors:*
  + *For all time slots:* 
    - *participants (including timekeepers) can’t be assigned to their chosen editors and agents (if they have any)*
    - *Can only assign agent-editor pairs that capture at least one of the participants’ genre(s)*
    - *Not allowed to schedule back-to-back sessions*
    - *Timekeepers not assigned to the people whose rooms they’re timekeeping for*
    - *If fill with a virtual attendee, ideally fill next slot with a virtual attendee (if meets relevant priority level)*
  + *For the 1:45pm slot (Exclude time keepers, give preference to virtual attendees in each priority category):*
    - *Priority 1: Friday workshop attendees with multiple QL critiques (by registration date)*
      * *1a: virtual*
      * *1b: not virtual*
    - *Priority 2: Friday workshop attendees, only 1 QL critique (by registration date)*
      * *2a: virtual*
      * *2b: not virtual*
    - *Priority 3: Multiple QL critiques but no Friday workshop (by registration date)*
      * *3a: virtual*
      * *3b: not virtual*
    - *Priority 4: Only 1 QL critique, no Friday workshop (by registration date)*
      * *4a: virtual*
      * *4b: not virtual*
  + *For the 2-4pm slots (give preference to virtual attendees in each category ONLY if 1:45 time slot had virtual attendee filling it):*
    - *Priority 1: Friday workshop attendees with multiple QL critiques (by registration date)*
      * *1a: virtual (if virtual in prior time slot)*
    - *Priority 2: Friday workshop attendees, only 1 QL critique (by registration date)*
      * *2a: virtual (if virtual in prior time slot)*
    - *Priority 3: Multiple QL critiques but no Friday workshop (by registration date)*
      * *3a: virtual (if virtual in prior time slot)*
    - *Priority 4: Only 1 QL critique, no Friday workshop (by registration date)*
      * *4a: virtual (if virtual in prior time slot)*
  + *For the 4-4:30pm slots (restricted to participants without Friday workshop):*
    - *Priority 1: No Friday workshop restrict to those without a Friday workshop, time keepers, and prioritize by registration date/time.*
  + *For the 4:45 time slot (restricted to participants without Friday workshop, and excluding time keepers):*
    - *Priority 1: Multiple QL critiques*
    - *Priority 2: 1 QL critique*

How we actually do this – iterative assignment without replacement:

* PARTICIPANT DATASET: We will assign numbers (1-2, or 1-3) for each row a participant has. Meaning that a participant who signed up for 2 slots will have a row labeled 1, and a row labeled 2; those who only signed up for one QL critique will just have a single row labeled 1.
* TIME SLOT DATASET: We will create a list of every time slot for every agent-editor pairing, sorted by time (earliest to latest) and agent-editor ranking (highest to lowest). Create additional columns: 1) exclude\_time\_keepers (1= time keepers cannot fill this slot, 0= timekeepers can fill this slot), and 2) exclude\_workshop (1= exclude from time slot because conflict with Friday workshop, 0= no conflict).
* We will iterate through each agent-editor-time slot (e.g., starting with row 1 of the TIME SLOT DATASET, and ending at the final row). This effectively means we will be starting with the 1:45 pm time slots, and starting with the highest rank agent-editor pairs (e.g., the more specialist, harder-to-match ones) and ending with those with the lowest ranks (e.g., the “generalists”, or easy-to-match ones), before moving on to the 2pm time slots and repeating the process.
  + For the 1:45 slot: We will exclude time keepers, and attempt to fill first with any Friday workshop participants with a row 2 who is virtual, then a row 2 who is in person, and so on.
    - The participant row assigned to the 1:45 time slots for each editor-agent pair are iteratively removed from the dataset with each time slot filled, so that the PARTICIPANT DATASET goes from the n being the total number of participant rows to fill, to n-1, n-2, n-3, n-4, etc.
  + With the 1:45 slots filled for all agent-editor pairs, we’ll then move to the 2pm time slot, assigning participants to the highest ranked agent-editor pairs first, and ending again with the lowest ranked ones. Will exclude participants who were already selected in the 1:45 time slot. Also, if the 1:45 slot for that editor-agent pair was virtual, will prioritize virtual again. Priorities 1-4 will be applied again.
    - Participant rows removed after each iterative assignment
  + Move to the 2:15 time slot. Again, assign highest ranking agent-editor first, and end with lowest ranking one. Exclude participants who filled the 2pm time slot. Prioritize virtual, 2pm time slot was virtual. Otherwise, apply normal priorities.
  + Continue on through the time slots, until all are filled. If any CAN’T be filled, fill with “OPEN TIME SLOT” for that agent-editor pair.
    - Hopefully, we won’t have any of these, but if this is the case, we may need to rework the agent-editor pairings, or review the participants whose genres match that to see why none were being filled there, and how things can be rearranged.
    - By the time we finish, we should end up with NOBODY left – will want to review the ‘final’ dataset after all the iterations to confirm no one is still in it. If anybody is, and there were OPEN TIME SLOTS assigned to an agent-editor pair, will want to review the dataset to see who was left out.

1. Open “Query Letter Critique Counts to Determine Pairings” Excel spreadsheet from previous conference’s Conference Schedule folder, save it to the current conference’s folder of the same name, fill it in with the current 18 editors and agents, and print it: name with room for 3 lines underneath, for the ongoing tally of appearances and for each time an agent-editor combination appears (and if there’s an imbalance between the number of agents and editors, you’ll need to pair two agents or two editors together, depending on which group has more representatives). Then, look at the MS Critique and Pitch agents and editors selected by each participant and count each time someone picks agents and editors (not just agents and not just editors, unless there’s an imbalance in the number of one group or the other). You want to combine one guest editor and one guest agent together to provide diverse viewpoints and also give the guests an interesting, possibly fruitful, experience. Try to spot common combinations of agents/editors, where people pick the same agents and editors over and over—these should be combined as Query Letter Critique panelists to increase the number of panels where you can assign these participants without overlapping with their MS critique and pitch choices.

* Tips: on the “Query Letter Critique Counts to Determine Pairings” Excel spreadsheet, copy each guest’s name and agency/publisher from the guest checklist of responses you’ve been maintaining since you signed them on and, underneath, fill in the name/initials of each of the editors—if this is an agent—or each of the agents—if this is an editor—so you can make counting hash marks when this one is paired with an editor/agent (opposite of whichever this one is). Only note when an agent is paired with an editor or vice versa, so you can spot those common combinations more readily. If an agent is paired only with other agents for a participant, don’t count; ditto with editors—UNLESS there’s an imbalance and you’ll need to group agents together or editors together.
* In your counts, include combos that have waitlisted pitches since you’re looking for common pairing combinations even with those late to the party. You might choose to assign that registrant to a panel that includes a waitlisted agent/editor as a gift, if that person is way down the queue with little hope of enough no-shows to open a spot. For those high up in the queue, it makes more economic sense not to give them a query letter critique with someone they might be able to pay for and pitch on Saturday.
* Per the point above, when you come across a participant doing the Query Letter Critique but NOT also doing a Friday Workshop, assign that person a timeslot from 4:00 to 5:00 (see below) to fill up those non-overlapping periods, saving the earlier timeslots for those doing both.

1. When the hash marks are all made, look at who has the most combinations first—those are your obvious pairings. Those with fewer common pairings can be combined last. If too many have no obvious winners, on separate scrap pages, write out the different combination possibilities and use the sum of hashmarks for each pairing to come up with an overall score. The sheet with the highest score is the set of pairings (i.e., panels) to go with. **Another thing to look at** are the query letter critique placement requests you’ve received from participants to make sure your pairings aren’t going to stymie any of these if possible, to avoid a refund situation.

* Assign each panel to a meeting room.

Assuming the time slot filling works well, will print the dataset with the editors/agents/room assignments to Word, with the participants for each time slot for them filled out. (Will basically create n pairing datasets, where each dataset is filtered to that particular agent-editor pairing time slot assignments.) Title it “Friday Query Letter Critique with [agent-editor pairing] in [room assignment]”

1. Make a Word doc copy of the panelist combinations and meeting rooms for printing now (to tabulate assignments), for the conference as a reference, and inclusion in timekeeper instructions.
2. On a new worksheet in this file called “Query Ltr Crit Panels & Rooms” list the pairings and rooms, leading with “Friday Query Letter Critique with ” to make it faster to insert the panel and location and time (e.g., “Friday Query Letter Critique with Andrea Somberg & Jennifer Letwack in Board Room 1 at p.m. US Eastern”). Note who will be virtual. Tip: use the same sheet from the previous conference and replace the pairings with the current ones.
3. You’ll be copying and pasting from that new worksheet (and filling in the assigned timeslot) onto the Friday Query Letter Critique worksheet and, when complete, moving this data onto the main worksheet. If you’ve received any special start time/personnel requests, fill those in first. Then, keeping in mind who’s also doing the workshop (they need the first 8-9 timeslots, i.e., before 4 p.m.), assign each participant to a Query Letter Critique panel and timeslot, making sure the panel doesn’t have any of their MS critique and pitch choices. Assign all those also doing the workshop before assigning those not doing the workshop. On the Agenda Item Name column, in the cell for the Query Letter Critique, replace with the appropriate cell from the “Query Ltr Crit Panels & Rooms” worksheet.
4. Try to fill up each panel evenly as you go, keeping track of the times assigned for each panel on the printed Word doc (item g above). For those who aren’t doing any critiques or pitches on Saturday, where you highlighted their rows above, go back to them after filling those where a particular assignment is critical to avoid an overlap. For those doing the Friday Workshop but not also doing a critique or pitch, highlight their rows with a different color and go back after all of the other assignments are made (they’ll need a pre-4 p.m. spot). For those who aren’t doing all activities, glance at the Waitlist file, on the sheet where you moved the MS Critique waitlist people, to see if there’s a chance to give them the person they wanted (assuming they don’t also have a pitch with that person or at least a favorable queue position for a waitlisted pitch with that agent/editor). **As you assign panel & time, change fill to red to show that person has been done (easier to keep track of as you scroll around confirming you got everyone).**
5. Use the Word doc you printed for each pairing with room # to fill in the timeslots as you make an assignment—this makes it easier to keep track and make changes or spot errors before they compound.
6. Query Letter Critique time slots are (15-min/13-min. intervals):

|  |
| --- |
| 1:45 p.m. / 1:45 p.m. |
| 2:00 p.m. / 1:58 p.m. |
| 2:15 p.m. / 2:11 p.m. |
| 2:30 p.m. / 2:24 p.m. |
| 2:45 p.m. / 2:37 p.m. |
| 3:00 p.m. / 2:50 p.m. |
| (15min break)  3:30 p.m. / 3:18 p.m. |
| 3:45 p.m. / 3:31 p.m. |
| 4:00 p.m. / 3:44 p.m. |
| 4:15 p.m. / 3:57 p.m. |
| 4:30 p.m. / 4:10 p.m. |
| 4:45 p.m. / 4:23 p.m. |

* NOTE: Use 13-min. intervals if you need to create more pre-4:00 spaces because so many participants are also doing the workshop.
* Tip: when you’re deciding what editor-agent pair to assign to a registrant, look at those pairings that have the largest number of hash marks (and don’t overlap with the Saturday critique and pitch choices for that person). Because the largest number of hash marks indicate the most potential assignment problems (due to their high frequency of occurrence), try to fill those up first so that other pairings will be open for those who chose the most popular editors/agents.
* If you have a number of virtual participants, try to group them to make it less disruptive for the timekeepers and in-person guests.
* For those doing the workshop, try to alternate between earlier and later times so that you still have options for those at the end of the alphabet (or do some at the start of the alphabet and then some at the end so as not to penalize any groups).

1. When finished, do an Agenda Item Name sort to verify no times are missing and none were duplicated.
2. Still on the Friday Query Ltr. Critique sheet, delete all non-query letter critique rows and then do a sort on last name and first name. Leave the highlight color for now.
3. Then, on the main worksheet, change the names of the 1st and 2nd Query Letter Critiques to just “Query Letter Critique” and do a sort on Agenda Item Name, last name, first name. This should align both sheets the same way. To be safe, you can add three column on the main sheet between the Agenda Item Name and First Name
4. For each individual who registered for a Query Letter Critique, copy the updated Agenda Item Name with panelists, location, and timeslot identified on the Friday Query Ltr. Critique sheet (and last name and first name) and paste these into the cells for that individual on the main worksheet in those new blank columns. Now you can confirm that the rows lined up correctly (highlighted names match the non-highlighted names) before replacing the Query Letter Critique cells with the highlighted assignment cells and deleting those three added columns, which are no longer needed. You can un-highlight the Query Letter Critique cells and breathe a sigh of relief. Everything after this is much easier!

Create a dataset with this Friday session info, so that all Friday events are grouped together per participant, ordered by time. Meaning: bring back the ‘Friday workshop’, ‘Friday mini seminars’, ‘Friday check-in’, etc rows again to create a ‘FRIDAY MASTERFILE’ dataset. We will use this to automate the output schedules for each participant, to print out for that Friday (e.g., as schedules to hand them), and also to include in the emails they receive.

## Saturday MS Critiques & Pitches

*Manually assign a room to each agent/editor, and assign the timekeepers for them. Make sure no timekeepers are assigned to agents/editors they’ve submitted stuff to. Create a dataset with this info.*

* *Create two datasets: Saturday Manuscript critiques, and Saturday Pitches.*
* *Iterate over each time slot and agent/editor for both of these datasets, similar to how it was done for the Friday critiques. However, there shouldn’t be any missings, and this should be a lot easier, since the only rules are as follows:*
  + *Participant can’t be assigned time slots occurring simultaneously or back-to-back*
  + *Ideally, start with virtual people, and schedule any other virtual people around the same time (e.g., make them back-to-back for the same agent)*
  + *Timekeepers can’t be assigned the first or last slots*
  + *Ideally, only a max of one time keeper should be assigned to each time slot, so that we technically need only one substitute all day*
* *DATA CHECK: Double check the two output datasets above to ensure no problems and every slot is filled and every person is assigned for the activities they paid for.*
* *Output the participants filling each time slot for each agent/editor on that day (for the morning manuscript critiques and the afternoon pitches) into their respective Word docs with the title “Saturday Manuscript Critiques and Pitches with [agent/editor name] in [room assignment]”.*
* *Output into csv the list of any timekeepers with activities, and their finalized time slots and rooms, so we can ensure a substitute is obtained for them.*

For Manuscript Critiques & Pitches:

* 1. Assign a meeting room for each agent/editor (copy and paste names from guest checklist you’ve been using since you started recruiting guests for this conference) and save this record in two Word documents (use previous conference Saturday MS Critique & Pitch Schedule Template, inserting the agent/editor name and room in the header, and Saturday Agent & Editor Room Locations). For any limited-access meeting rooms, consider any guests and participants with mobility issues.

1. Create and print a Word doc for each guest with room # and times. Fill in the participant name every time you make an assignment—this makes it easier to make changes or spot errors before they compound.

1. Create a temporary new worksheet with the registrants sorted by last and first names. This will help you easily locate those with special time requests and volunteers and also quickly check to see if someone has 1, 2, or 3 critiques/pitches so you can schedule them without overlaps. You’ll delete this after the scheduling is done.
2. Data sort on the Agenda Item Name and also Last and First Names.
3. From most recently completed conference registration spreadsheet, copy the tab labeled “MS Critique & Pitch Rooms,” create a new worksheet in your current conference sheet, paste this tab, and do a find-and-replace, inserting the names of all agents and editors with their assigned room locations. This will enable you to easily copy and paste these cells onto the main worksheet and insert the appropriate time slots (e.g., Saturday Manuscript Critique with Bess Cozby in Board Room 2 at a.m.). By doing away with the A/B/C on the registration sheet for schedule transmission to participants, you’ll save on confusion and have flexibility. Note which guests will be virtual.
   1. Resort on Last Name, First Name, Agenda Item Name so you can fill in each person’s ms critique and pitch schedules completely. This will allow you to space out the meetings appropriately, avoiding overlaps.
   2. When assigning times, start with special requests, those with 3 MS critiques or pitches, and volunteers who are doing critiques/pitches. For the volunteers, avoid overlapping their times and spread them as much as possible so the substitute timekeepers can go from one to the next without stress (unless you have plenty of substitutes on hand). Try to schedule them just before/after the midpoint break or near the end to minimize disruptions (don’t put them in the last pitch spots because they might also want to pitch the agent/editor they’ve been timekeeping for). If any substitute timekeepers register for critique/pitch spots, schedule theirs as early/late as possible so they’ll be available when needed.
      1. On the Schedule Template for Qry Ltr, MS Crit & Pitch Times page you printed, note which timekeepers are scheduled at what times so you can easily see when and how many substitute timekeepers will need to be engaged.
      2. **If you have virtual participants, do the scheduling for them after you finish with the timekeepers and cluster them in individual schedules so that in-person guests don’t have to jump back and forth too much but spread them out between different guests’ schedules (i.e., don’t put them all before or after a break) to make it easier for the Zoom volunteer.**
      3. **After all the special ones are done, do a sort on Agenda Name, Last Name, First Name, which will line up all the remaining critiques and pitches by A/B/C Guest Name and you can quickly fill in the remaining time slots. Schedule the A’s for a guest, then the B’s, then the C’s.**
4. When complete, do a sort on Agenda Item Name and scroll through all MS Critique and Pitch timeslots to make sure there are no gaps, overlaps, or missing assignments. Also do a sort on Last and First Names to make sure you didn’t give someone the same time for 2 different meetings.
5. Replace the contents of the main page with the contents from the temporary sheet.

# Prepare the Mail Merges

* *Create a combined Friday dataset that has all Friday activities organized by participant, by time. Change any activities (like Friday Publisher Q & A) to include the time and location of them*
* *Create a combined Saturday dataset that has all Saturday activities organized by participant, by time. Change any activities (like Saturday Agent Q & A) to include the time and location of them.*
  + *Combine the Saturday and Friday datasets, and transform them so that there is one row per person, with the different activities as columns:*
  + *First Name*
  + *Last Name*
  + *Email Address*
  + *Mobile Phone*
  + *Hotel vs. Zoom*
  + *Friday Editor Q&A Panel*
  + *Friday Query Letter Critique*
  + *Friday Query Letter Critique #2 (incl. if you provided this opportunity)*
  + *Friday Workshop*
  + *Saturday Agent Q&A Panel*
  + *Saturday Manuscript Critique (1, 2 and 3)*
  + *Saturday Pitch (1, 2 and 3)*
  + *For anyone in the waitlist dataset from earlier, who wasn’t yet slotted into anything, and who hasn’t paid for any activities, remove them from the combined dataset and put into their own waitlist dataset (if applicable).*
  + *Split the remaining dataset of paid participants into two datasets:*
    - *Virtual attendees*
    - *In-person attendees*
* *For the virtual dataset, replace any room locations with “Zoom”.*

1. Make additional changes to Registration worksheet to prepare mail-merge document:
   1. Do a Find-and-Replace (all) on Friday Publisher Q&A Panel, changing all listings of it to: Friday Publisher Q&A Panel in College Park Ballroom at 12:30 p.m. US Eastern – assuming the Westin ATL Airport is the conference hotel.
   2. Do a Find-and-Replace (all) on Friday [name] Workshop, changing all listings of it to: Friday Workshop in College Park Ballroom at 4:00 p.m. US Eastern.
   3. Do a Find-and-Replace (all) on Book Fair Book Selling, changing all listings of it to: Friday Book Fair Book Selling in Peachtree City Room from 11:00 a.m. to 4:00 p.m. US Eastern.
   4. Do a Find-and-Replace (all) on Saturday Agent Q&A Panel, changing all listings of it to: Saturday Agent Q&A Panel in College Park Ballroom at 9:00 a.m. US Eastern.
   5. Do a Data Sort on Hotel vs. Zoom, Last Name, First Name, Agenda Item Name. You’ll want to have two versions of the Listing for Mail Merge—one for in-person attendees and one for virtual people—because each group will get a different mail merged letter (the latter will have Zoom links).
   6. Because you’re about to manipulate all this hard work (see below), it’s better to do it in a separate worksheet in case of error: create a new worksheet called “In-person Listing - Mail Merge” and another one for “Virtual Listing - Mail Merge.” On these new worksheets, we need to create columns for each of the activities so we can move each participant’s listings under the appropriate column. This will enable the mail-merge for each person to show each registered item in the appropriate order. Here are the columns in the proper sequence (copy and paste these from previous conference schedule file):

First Name

Last Name

Email Address

Mobile Phone

Hotel vs. Zoom

Friday Editor Q&A Panel

Friday Query Letter Critique

Friday Query Letter Critique #2 (incl. if you provided this opportunity)

Friday Workshop

Saturday Agent Q&A Panel

Saturday Manuscript Critique (1, 2 and 3)

Saturday Pitch (1, 2 and 3)

* Tip: Go to View and Select Freeze Top Row option so it stays there when you scroll.
* ***If anyone else registers, update this worksheet AND the main Registration worksheet.***
  1. On the main sheet, reorder the columns to follow this order:

First Name

Last Name

Email Address

Mobile Phone

Hotel vs. Zoom

Agenda Item Name

* 1. Copy all participants’ details from main sheet into this new sheet, under the headings (all Agenda Item Names should appear under the Friday Book Fair column).
  2. For each participant, move their registered activities under the appropriate columns, making sure these all appear on **one row** for that individual. Make sure you moved things into the correct columns and then delete the rows for that person that no longer contain any activities. Make sure the Earlier and Later columns are used for the earlier and later times, respectively, for MS Critiques and Pitches.
  3. For those on Waitlists for pitches, populate the Earlier Pitch column first and then the Later Pitch column if they have a second standby—you can rank order them per their position in the waitlist queue, so they see the most likely opportunity first.
  4. If they are participating virtually via Zoom, create a new sheet called Virtual Listing - Mail Merge—they will get a different mail-merged e-mail. Duplicate the top row of the In-person version, and then move all virtual participants who’ve paid for something (not waitlist only) onto this new sheet. Then, replace the room information with “via Zoom“—this is only for virtual participants.
  5. If they only have waitlists and no other activity (i.e., they haven’t paid for anything yet), create a new sheet called “Waitlist Only for Mail Merge” with the same top row of labels and put those people there—they will get a different mail-merged e-mail.
  6. Scroll through this worksheet once to make sure you deleted the now-blank rows.
* *Using the templates provided, create the mail merge document to be sent to each registrant. Make sure to replace any conference-specific content in the templates prior to doing so (like the speakers and their presentation titles).*
  + *Will create 3 separate ones:*
    - *Virtual 🡪 we will need to create zoom links for these*
    - *In person*
    - *Waitlist 🡪 this email will likely prompt lots of people to email back and drop off the waitlist*
  1. Save the file and create the Mail Merge document to be sent to each registrant, using the columns labeled in 4g above, by updating the previous conference file titled “Instructions to Attendees – Top of Letter for Mail Merge – template” and “Instructions to Attendees – Standard Remainder of Letter.” When modifying the template, right-click the previously merged fields to Toggle Field Code (shows the code rather than data from last conference). Double-check to be sure you replace conference-specific content (e.g., speakers and their presentation titles) throughout these documents.
  2. When doing the mail merge, select the correct file and the Listing for Mail Merge worksheet, and scroll through the listed names to double-check for duplicates (which means you didn’t delete all their extra rows) and for those who will no longer attend but they’re owed a MS critique, so they’ve stayed on the list (they don’t need an e-mail reminder because they won’t be there). Follow this same process for those on the Waitlist Only for Mail Merge sheet, modifying that template Word file from the previous conference.
  3. To do the Virtual attendees’ letters, you’ll first need to create Zoom links for the Friday query letter critique meetings and the Saturday manuscript critique and pitches meetings (the Saturday activities can share the same link to make it easier on the guests and participants—less to keep up with).
  4. Send the Waitlist only e-mails first—this often results in those people cancelling, so that the registered people on waitlists can move up—you can then modify the merged and ready-to-send Top of Letter for Mail Merge Word doc so they know their latest standing.
  5. E-mail each letter, pasting the merged doc followed by the Standard Remainder doc in each e-mail.

# Printing Room Schedules

1. Creation and Printing of Room Schedules: wait a few days to create the Word files after sending participants their schedules as inevitable changes will occur, but don’t wait too long—you need to do this so you can e-mail the meetings schedule to editors/agents. Printing can wait until the Wednesday/Thursday before the conference to minimize wasted paper as schedule changes inevitably will crop up.
   1. On Excel file, create a new (temporary) sheet; copy the main registration sheet data onto it; do a data sort on Agenda Item Name; and make all cells Arial and 20-pt.
   2. You don’t need to merge first and last name cells for the Word doc—instead, using the Word template for the room schedules, highlight both cells on the Word doc and then copy both cells from the Excel duplicated (temporary) registration sheet and paste them into Word. For the MS critiques, you can copy and paste 5 names at a time (before and after the break); for the pitches and query letter critiques, you can do 6 at a time.
      1. Go ahead and fill in the pitch slots too on the Word docs so those files will be done. Do the query letter critique Word schedules so they’ll be finished, too.

# Emailing Editors, Agents and Volunteers with Instructions

1. E-mailing editors, agents, volunteers with instructions
   1. **After sending participants their schedules, send the “check-in” email to the agents/editors to give them a heads-up that their schedules will be coming soon and to nudge them about completing their manuscript sample critiques. They will also need to put in their order for Friday lunch and dinner.**
   2. Update the Word doc instructions template from the previous conference.
   3. A week before the conference, send the volunteers their schedules and instructions. Use previous conference’s file as a template.
   4. A week before the conference, send the guests their detailed instructions and attach the Friday and Saturday critique and pitch schedules for the agent/editor. Use previous conference’s file as a template.
   5. A week before the conference, send the Friday and Saturday guest speakers their instructions and schedule. Use previous conference’s file as a template.

# Late Registrants

1. For late registrants (after 1-8 above are done)
   1. If they registered for any waitlists, update Registration sheet with their # in each queue.
   2. Update the In-Person/Virtual Excel sheet with their name and activity(ies), including waitlists.
   3. Use the mail merged Word doc and the template for the remainder of the schedule letter to send them the same reminders and schedules everyone else already received, substituting what these latecomers registered for, including waitlists.

# Printing Schedules, Rosters and Bios

* Items to print based on the more automated data we created:
  + Room schedules (to be posted on the doors and put in the rooms for the agents/editors) for both Friday and Saturday – print Thursday before conference
  + Participant and time keeper name tags
  + Guest and Speaker name badges
  + Name plates for Q&A panel (can use our manually created editor and agent dataset)

1. Printing schedules, roster, and bios
   1. Award certificates, main room schedule for posting, schedules for the guests (with maps marked with their meeting room), volunteer list and name tags, guest and speaker name badges and name plates for Q&A panels, agent & editor bios for waitlist wall, and the pricing, maps, and other items for the registration table—except for the participant name tags, Friday and Saturday schedules for walls, participants, and guests, and the roster—can be printed a week in advance, as these are not likely to change. For check-in table, print one packet of items to share.
   2. Wait until the Wednesday before the conference, at the earliest, to print the Friday and Saturday critique and pitch schedules, query letter critique and pitch waitlists, and participants’ name tags and Friday and Saturday schedules (incl. those only on waitlists if there is anyone attending in-person), because participants might cancel at the last minute. BEFORE you do the mail merge to create these printed schedules, though, run and export a Registrants report in Cvent and compare this to the “In-person Listing - Mail Merge,” “Virtual Listing - Mail Merge,” and “Waitlist Only for Mail Merge” tabs to make sure you didn’t leave anybody off (which is an easy mistake to make in the weeks leading up to the conference). Hopefully, the only ones not on your registration spreadsheet will be those who canceled recently so they will still be on Cvent but not on the registration sheet, only did the pre-conference edit, or only got on manuscript critique waitlists but didn’t get a spot.
      1. Place the Friday schedules in the three A-Z letter boxes for distribution. On Friday late afternoon, any of these remaining can be recycled and the Saturday schedules will go in the boxes.
      2. Also create Friday and Saturday schedule summaries for the agents and editors to pick up from the check-in table (use folder labeled “Agent & Editor Summary Schedules for Printing” in the “Conference Schedules and Room Assignments” folder from previous conference as a template), with a personalized map attached to each showing where they will be that day.
      3. For the Friday and Saturday critique and pitch schedules, one copy will go in each agent/editor’s meeting room. Also to go on their table on Saturday are two pages that provide guidance about selecting the best MS sample and best pitch, with space for them to write the winner(s) for each, to expedite award certificate creation.
      4. When doing the pitch waitlists, which will cover about 4 pages, use the previous conference “Waitlists for Pitch – Print” file as your template. Start by using your Checklist for Guest Replies to My Requests file to copy and paste all the correct agents and editors’ names into the 18 sections—this will remind you that the Waitlist spreadsheet you’ve been using is sorted on the first name of the guests, not their last name. Create a temporary sheet in the Waitlist file, copy everything from the pitch and query letter waitlists there, and make all the cells Arial – 16 pt so they’ll easily copy and paste into the “Waitlists for Pitch – Print” file. Be careful as you copy and paste to ensure you’re grabbing the right person’s waitlist. On the far right, indicate whether they’re using Zoom, which will be helpful to know when you’re trying to fill a last-minute opening. Insert all of the rows into this sheet and **only then** start to play around with row inserts and deletions to avoid overlaps from one page to the next.

# Automated Reminder Texts

1. Manipulating Excel file for TablesReady.com software (do this on Wednesday/Thursday before the conference, to avoid a lot of changes as participants drop and add)
   1. We have an account at TablesReady.com that enables a registration table volunteer to rapidly text participants prior to their meetings. The email tied to this website is [awconference@gmail.com](mailto:awconference@gmail.com), the username is **GeorgeWeinstein** and the password is **AWCtr1914**
   2. Create a worksheet on the same Excel file we’ve been using, name it “TablesReady Listing” and copy and paste all the data from the main worksheet onto it.
   3. Do an Agenda Item Name data sort and delete all rows except the confirmed (not waitlisted) Query Letter Critiques, Manuscript Critiques, and Pitches, because these are the activities for which we’ll text reminders.
   4. To get the data into TablesReady, we do have a CSV import function using a standard format. The file needs to be in the format " Date, Time, Name, Size, Phone, Notes".
      1. Insert 6 columns before the leftmost column of the worksheet and name them per the above (copy and paste from previous conference registration file).
      2. “Date” will be the Friday date for the Query Letter Critiques and Saturday date for the Manuscript Critiques and Pitches. Put these in the format “11/3/2017”—you can enter the first one and then copy and paste this into all the others for Friday and then repeat this process for the Saturday date activities.
      3. “Time” needs to be in the format of “1:45pm” with no spaces or periods. Elsewhere, you might have used “1:45 p.m.” for readability, so do a Find on “ p.m.” (with a space before the p.m.) and Replace All with “pm” (no space in front). Do the same to convert “ a.m.” to “am”. Then, refer to the previous conference Registrations to Date spreadsheet and find the “TablesReady Standard Times” tab. Copy and paste from this tab into the “TablesReady Listing” tab for the Query Letter Critique, MS Critique, and Pitch meeting timeslots if the timing was the same (Friday query letter critique times in particular may vary, and if anyone dropped their ms critique meeting and was replaced by a pitch meeting on Saturday, those times will be off too, so be careful).
         1. To be safe, paste times to the right of the last column (showing the actual activity and time) and doublecheck that all are correct for each agent/editor, correcting the ones that aren’t due to a ms critique/pitch swap and then paste THAT column of corrected times under Column B.
      4. “Name” requires you to merge the current First Name and Last Name columns, which involves some Excel trickery. The following was copied from <https://www.ablebits.com/office-addins-blog/2013/10/13/merge-columns-excel-without-losing-data/>:

Graphical user interface, application

Description automatically generated

Graphical user interface, application

Description automatically generated

Graphical user interface, application

Description automatically generated

Graphical user interface, application, table

Description automatically generated

After this merge process, you can delete the First Name and Last Name columns.

* + 1. “Size” can be “1” for all participants.
    2. “Phone” needs to be in the format of 10 digits with no spaces or punctuation. The conference registration form requests this, but scroll down the Mobile Phone Number column to make sure participants have complied and correct any who haven’t and delete the rows with international numbers (they won’t get a text reminder). Copy and paste the Mobile Phone Number data into the Phone column.
    3. “Notes” can be the Agenda Item Name data, so the volunteer can see at a glance who the participant is supposed to meet with and where.
    4. Delete the columns to the right of “Notes.”
    5. **Do a new Data Sort on Date and then Time and then Notes, to order the appointments correctly (all the same times batched together).**
    6. Copy the Query Letter Critiques and Manuscript Critiques from this worksheet into a new Excel file, name it “[Conference Month & Year] TablesReady Data – Batch 1” and save it in your conference folder **as a CSV file, not an xlsx**. Do the same with the Pitches from this worksheet and save it as a CSV file labeled “[Conference Month & Year] TablesReady Data – Batch 2” (TablesReady can’t accept a CSV with 300+ records in one file, so two batches will be needed).
  1. In TablesReady, go to "Appointments" then "Import." Select the Batch 1 CSV file you saved to load all our appointments. Once the file is loaded, you just scroll to the bottom of the page and click Upload to add them. It takes a few moments to populate the site, so don’t redo this or you’ll have everyone listed twice. Then click Import again and do the same with Batch 2.

## Print Name Tags

1. Name tags for participants (do this on Thursday before the conference to minimize discards/additions)
   1. On the “In-person Listing - Mail Merge” sheet, paste in the in-person people from the “Waitlist Only” sheet and resort on last and first name.
   2. Create a new sheet titled “Name Tags” and populate it with the first two rows (first and last names) from updated “In-person Listing - Mail Merge” sheet.
      1. Delete any volunteers who are also registrants, to avoid duplicating name tags, except for volunteers who paid to attend the Friday workshop (they’ll need a blur dot on theirs).
   3. Use the sheet titled “Name Tags” to do a mail merge Word doc (using previous conference doc as the template) so you can print the name tags.
   4. After you print the name tags, refer to the Roster for Printing sheet and put a large blue dot in the bottom right corner of each name tag where that person has registered for the Friday Workshop (to keep out scofflaws). Reclip tags to cardboard holder in Avery boxes and put them in the large name tag box with the guest and volunteer name tags.

## Print Participant Roster

1. Roster for Printing instructions (do this on Thursday before the conference to minimize changes)
   1. The registration table volunteers and you will need a roster of participants and what they’re doing, so create a new sheet on the main Excel file titled “Roster for Printing.” Copy from the Main Registration Sheet.
   2. Sort by Agenda Item Name and, in the cells showing assignments for Query Letter Critiques, Manuscript Critiques, and Pitches, plus waitlists, change the text of all the other activities to dark gray so the black ink for the critical activities that participants will inquire about will stand out.
   3. Sort by Last & First Names. Bold the last and first name columns; change the in-person status verbiage to “Hotel” and the virtual status verbiage to “ZOOM” and relabel that column as “Locale”; delete the e-mail address column, clear any duplicate rows of the same name, phone, and location; relabel Agenda Item Name header as “Conference Activity”; relabel Mobile Phone Number as “Cell #”
   4. **This is now the sheet that matters most, because it’s the one that will be printed before the conference.** Therefore, if anyone changes/adds/deletes/cancels, it’s this sheet that needs to be updated, along with the Name Tag sheet.
   5. **For Printing,** highlight the data and specify Set Print Area, then play with the sizing until all columns fit on one page (~65% of normal size), change the orientation to landscape, and make the top and bottom margins 0.25 to maximize what you can fit on a page, but also increase the font size to 14 to make it easier to read at a run. Then at the bottom right, click the Print Break Preview block to see where the breaks are and manipulate so that no one’s listings wrap from one page to the next. Once this is set, print this tab.

## Create Zoom schedule with links and times

1. Also on Thursday before the conference, create a Zoom schedule showing all the query letter critique, MS critique, and pitch times, which participants have a meeting at that time, and with whom—this will be your master list for moving people into Zoom breakout rooms on Friday and Saturday. Use previous conference’s schedule spreadsheet, saved in the Zoom folder.
   * 1. To do this, and populate it with the Main Registration page data, create a temporary sheet in your Registrations file and paste all the data from the main registration sheet. Then sort on Hotel vs. Zoom and delete the in-person participants, leaving only those on Zoom and then sort on the Agenda Item Name (note: this process, while it has several steps, will be a little faster than working with the Virtual Listing - Mail Merge page unless you only have a dozen or fewer people doing Zoom meetings).
     2. As with the Tables Ready sheet, add two columns to the left: Day and Time. Put Friday for all the query letter critiques and Saturday for all the MS critiques and pitches. Then copy and paste the time from each row into the new Time column. Next, move the First and Last Name columns between the Time and Agenda Item Name columns.
     3. Sort on Date and then Time. Refer to the last conference registration sheet for the way that “Zoom Schedules” tab was formatted for guidance. Highlight all cells and Format Cells using the Inside (not Outline) option, putting a heavy line around all cells. Then put a space between every time period for reading ease after printing. Make each row 1.5 tall and increase the font size to 14, again for readability. **Leave some blank rows per timeslot for last-minute additions to Zoom.** Do a print preview to make sure any one time period does not wrap onto another page.
     4. Set the print area and print this sheet.

# Tracking the Conference Prep Process

1. Use the file “Checklist for Conference Materials” to make sure you’ve printed and packed everything you’ll need for the conference.