

# 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.

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## 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.

[Portal-SelectEvents.png](#)

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The resulting portal looks like this.

[Portal-SimpleList.png](#)

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## 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.

[ManageSegments-SortByDate.png](#)

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The resulting portal looks like this.

[Portal-DateTabs.png](#)

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## 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.

[ManageSegments-Tracks.png](#)

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The resulting portal looks like this:

Portal-TrackTabs.png

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# 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.

## Add Breakout Session interface and fields

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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.

SegmentFormat-Default-Callout.png

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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
__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.



# 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**.

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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.

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## 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.

[Portal-AgendaLayoutOptions.png](#)

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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.



Portal with events sorted into broadcast date tabs

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**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**.

Manage Categories window shows Broadcast date tabs as the Automatic Grouping option

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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.

## Portal with events sorted into custom categories by day

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### 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 window shows the None as Automatic Grouping option and 3 custom categories.



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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 section shows the events split into categories

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