Presentation Management Checklist

Version 1.2

September 2023

FOR PROFESSIONAL USE ONLY

Meeting and Client setup

☐ Determine whether cOASIS customer or not
- If not, the Distributor Administrator (DA) is responsible for creating the association
- DA creates the meeting contract
- DA creates the meeting

☐ Meeting Information Sheet
☐ Session Types
☐ Activities
☐ Locations
☐ Copy to Sandbox
☐ Record Import to Sandbox
- Validate

☐ Record Import to Production
- Validate

☐ cSlide Meeting Creation

Media types and items

☐ Create Media Types
☐ Create Templates
☐ Apply Media Types to Activities
☐ Automation Flags

Portal and Campaign

☐ Configure the Presentation Portal
- Configure cAdmin Portal Settings Flags and Fields

☐ Campaign For inviting Presenters to upload
☐ Speaker Ready Room (SRR) Presentation Portal
☐ Set SRR Instructions
☐ Test Portal by uploading a file without the Agent
☐ Session View & Edit permissions for Session Leaders and Session Organizers

Session and Presentation review

☐ Review Uploads with Presentation Dashboard
☐ Check Automations
- Flags
- Conversions

Server and Pre-Event testing

Please test before being onsite and at least two weeks prior to the event starting.

☐ Setup server
☐ Configure computer as Speaker Ready Room (SRR)
☐ Configure computer as Session Room (SR)
☐ Network the SRR and SR computers to the server
☐ Check the Caching Server Status page for “External IP” and “Whitelisted at”

☐ Login as user in SRR computer
- Test SSO if used
- Test token
- Test QR

☐ Upload file (3 ways: cAdmin, Presenter Portal, SRR Portal with Agent)
- Edit file (only works with Agent)
- Preview (only works with Agent)
    - Logout

☐ Open SR to room that test presentation is in
- Test room sync
- Open file
- Check presenter view if used
- Test break slides

☐ Check the Caching Server Status page for errors

☐ Check session room spelling, fonts, background, and banner

Onsite & Preshow (double-checking the same list as above)

☐ Setup server

☐ Configure computer as Speaker Ready Room (SRR)

☐ Configure computer as Session Room (SR)

☐ Network the SRR and SR computers to the server

☐ Check the Caching Server Status page for "External IP" and "Whitelisted at"

☐ Login as user in SRR computer
- Test SSO if used
- Test token
- Test QR

☐ Upload file (3 ways: cAdmin, Presenter Portal, SRR Portal with Agent)
- Edit file
- Preview
    - Logout

☐ Open SR to room that test presentation is in (check all rooms)
- Test room sync
- Open file
- Check presenter view if used
- Test break slides

☐ Check the Caching Server Status page for errors

☐ Re-Check session room spelling, fonts, background, and banner

Onsite Daily Operational Checklist – Every Day & Every Room

Every Morning

☐ Start laptop on stage

☐ Log in to session room

☐ Press F11 for browser full screen mode

☐ Sync presentations (full day)

Before EVERY Session

- ☐ Sync presentations
- ☐ Click through presentations (quality check)
- ☐ Check for missing files
    - Sync again shortly before session start
- ☐ Open intersession slides

During Sessions

- ☐ Assist speaker with navigation (opening presentations etc.)

End of the Day

- ☐ Sync all presentations for upcoming days
- ☐ Log out