



Presentation Management Checklist

Version 1.2

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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