STEP-BY-STEP HOW TO BUILD MY VIRTUAL BOOTH SPACE

Please note you can go back and edit any step at any time during the virtual booth building process.

Step 1: Name Your Booth

The name you choose for your booth space will be displayed in the event's directory of sponsors.

1. From the main home screen click "**Name**".
2. Type in your desired name.
3. Click "**Apply Changes**".

You've completed step 1!

Step 2: Choose Your Booth Color

You have the option to choose two (2) colors for your booth space. One is your main space color, the other is your accent color.

How to Choose Your Booth Color:
- Option A:
  o Select your colors from the drop-down menu.
  o Click "**Save**" in the lower right-hand corner.

- Option B:
  o Click the "**Define Custom Color**" button.
  o Next, enter a specific shade of color by entering the six-digit HEX value (i.e. # CCCCCC), or the individual numbers for Red, Green and Blue.
  o Finally, click "**Save**" in the lower right-hand corner.

Once you have saved your colors by way of Option A or Option B, it will display in the main work area but make sure to click on "**Apply Changes**" to save all work.

You've completed Step 2!

Step 3: Select Your Booth Style

Selecting your booth style allows for aesthetic value as well as to match your corporate image.

1. To preview the style options, select the thumbnail you want to preview, and a larger image of the style will appear.

2. Once you have decided on the style, select your choice and then click on "**Apply Changes**". This will save your style selection.

You've completed Step 3!

Step 4: Adding Your Company Logo

Please refer to the Preferred File Formats and Other Requirements table for the accepted file formats and other technical specifications.

How to Add Your Company Logo:
- Option A: Upload your company logo from your computer
  - Click "**Upload New Logo**"
  - Click "**Browse**"
  - Select the Logo file you wish to upload and Click "**Start Upload**"
  - Finally, click "**Apply Changes**."

- Option B: Link your company logo from a hosted remote server
  - Copy or type the complete URL of the file you want to use, beginning with http://
  - Paste the complete URL into the **Logo URL** field.
  - Click "**Apply Changes**", your logo will appear in the work area.

- Option C: No Company Logo
  - If you do not have a logo that you wish to upload, you can just enter your sponsor space name as plain text by checking the box next to "**Use My Space Name**".
  - Next define the font, color and size of your text
  - Finally, click "**Apply Changes**."

You've completed Step 4!

Step 5: Add a Company Description

Time to add a brief message for attendees to see! The company description, also known as "About Us", will appear when an attendee hovers over your company name in the exhibit hall as well as within your booth display.

- To add the About Us message, simply type in the text you want to display.

  Note: The "About Us" message does not support the characters ", %, or &

- Once you are satisfied with the About Us message, click "**Apply Changes**".

You've completed Step 5!

Step 6: Create a Main Screen for Your Booth

This step allows you to add exciting animations, slideshow presentations, graphs, product images, and short video clips to your virtual booth space that will catch an attendee's attention. This section,

referred to as "Front Screen" will be the first thing your attendee will see once they click on your virtual booth space.

*Please refer to the **Preferred File Formats and Other Requirements** table for the accepted file formats and other technical specifications.*

How to add a Front Screen:
- Option A: Upload an image from your computer
    - Click "**Upload New Image**."
    - Click "**Browse**."
    - Locate the file you wish to upload on your hard drive.
    - Click "**Start Upload**." When the upload is complete your file will appear in the work area.
    - When you have finished uploading, click **"Apply Changes"**.

- Option B: Add a link to an existing file hosted on a remote server (i.e. your company's website)
    - Copy or type the complete URL of the file you want to use, beginning with "http://".
    - Paste it into the **Logo URL** field. If you know the full path, you may also type it in.
    - Click **"Apply Changes."** Your file will appear in the work area.

IMPORTANT NOTICE: If you are trying to upload a **.SWF file** created by SitePal or OddCast, you must add the following ActionScript at the stage level of your .SWF: **this._lockroot = true;**

This ActionScript will prevent the .SWF file from interfering with your virtual space performance and attempting to open the .SWF in a new browser window (typically labeled as "UNDEFINED").

You've completed Step 6!

Step 7: Add Videos to Your Display

Now it's time to add one or more videos that will display in your video collection of your virtual exhibit space. This will allow attendees to scroll through and select a video for viewing. The video collection is a great way to display product demos, case studies, and other company related information.

*Please refer to the **Preferred File Formats and Other Requirements** table for the accepted file formats and other technical specifications.*

Arranging and Uploading Your Video(s):
- **Settings**
    - Use the **"Sort By"** dropdown to select the order in which your videos will display.
    - Options for Video Display
        - Option A: Select **"Auto Play"** if you want your videos to play automatically.
        - Option B: Select **"Loop"** to have your videos start from the beginning once they have completed.
    - Use the **"Layout"** dropdown to select the view in which your videos will display.

- **Adding the Video(s)**
    - First enter the **"Title"** of your video.

- Second enter the **"Description"** of your video. The description will display when an attendee hovers over the video thumbnail and/or title.
- Select the **"Active"** checkbox if you want this video to display in your booth space.
- Next enter a number in the "**Display Order**" field. This number determines the order your videos will be displayed: lower number tabs appear at the top.
- Use the **"Language"** dropdown (if applicable) to select which language you want to make this video available to.
- Select **"Browse"** to search for a video on your computer to upload.
- Enter a **"Thumb URL"** to have a thumbnail image display of your video. *NOTE: If uploading a non-flv file, a thumbnail will automatically be created from the first frame of your video. Image dimensions are 120px X 90px.*

When you have finished uploading your video, click "**Save Changes**" and you will be brought back to the Videos home page where you will need to click "**Apply Changes**".

You've completed Step 7!

Step 8: Add Important Documents to Your Display

This step will allow you to upload files and links (for example, your corporate website, brochures, product details, etc.) that will be available for attendees to view while visiting your booth.

To add a document or link:
- First, click "**Add New Document/Link**."
- Second you will need to select how you would like to add your file:
  - Option A - If you would like to upload a file from your hard drive, click on the "**Upload a File**" tab.

  - Option B: If you would like to link to an external URL, click on the "**Enter a URL**" tab.
- Next enter the title of the file or link in the "**Title**" field.
  - If you must use an exceptionally long title or need to include additional information, then enter the additional text in the "**Description**" field. This title will be displayed in the list of documents and links in your digital booth space.
- If desired, you can specify the "**Subject Category**" of the file or link, otherwise click "**None".**
  Note: Selecting a Subject Category allows you to display the document/link in your booth space as well as in the event's Media Center (if available).
- Now choose the file/link "**Category**." The category will be displayed in the list of documents and links in your booth space.
- Enter a display order number for the document/link.
  Note: The display order entered here affects the order of display in the content tab and in "My Briefcase." It does not affect the display order in the Media Center.
- If uploading a file, click **"Browse"** to locate a file on your local drive. If you are creating a link, type the URL of the file that you wish to link to.
- Click **"Save File"** or **"Save Link."**
- The document/link will appear in the main Documents and Links window now.

Documents and links can be edited by clicking on the record that you want to edit on the list page. Once you have made edits to the content make sure to click **"Save."**

In order to make your documents accessible from within your booth space, you will need to set up one of your content tabs specially marked as a **"Select Documents and Links"** tab. See **Step 9** (next step) for instruction on setting up the special **Tab Content** tab.

Once you are satisfied with the list of your documents and links, click **"Apply Changes".**

You've completed Step 8!

Step 9: Create a Special Tab Content

This step allows you to setup and configure the bulk of your booth space content, which is displayed in a tab format within your space.

You can link your tab to the documents and links that you uploaded in the Documents/Links step, redirect a tab to an external web page, or create a custom HTML page to be displayed when the user clicks on the tab. The default setting when adding a new content tab is External Web Page.

After clicking **"Add New"** to create a new tab, follow the steps below based upon what action you want to occur when the user clicks the tab.

OPTION A – SELECT DOCUMENTS AND LINKS:
Used to configure tab content by displaying a list of documents and links uploaded in the <u>Documents and Links</u> step (**Step 8**).

Note: *It is not recommended to have both a Web Folders feature and a Select Documents/Links feature because the different user interfaces can cause confusion for the attendee.*

To add documents/links:
- Enter the tab name in the **"Title"** field. This title will appear on the tab that is created.
- Enter a number in the **"Display Order"** field. This number determines how your tabs will be sorted; lower number tabs appear at the top.
- In the "**Content Type"** drop-down menu, choose **"Select Documents and Links"** or **"Documents and Links."** If you want to display all of the documents and links on one tab, select the **"Documents and Links"** content type. If you want to split the records between multiple tabs, choose the **"Select Documents and Links"** content type.
- Activate the **"Track Visits"** checkbox to enable this reporting feature. The system will keep track of how many users click on the tab, and this information will be available in your booth space activity report.
  - Place a checkmark next to the documents and links that you would like to display when the user clicks this tab.
- Finally, click "**Save Changes**".

OPTION B – EXTERNAL WEB PAGE:
Used to link your tab to an external URL.

To add an external web page:

- Enter the tab name in the **"Title"** field. This title will appear on the tab that is created.
- Enter a number in the **"Display Order"** field. This number determines how your tabs will be sorted: lower number tabs appear at the top.
- In the **"Content Type"** drop down menu, choose **"External Web Page"**.
- Activate the **"Track Visits"** checkbox to enable this reporting feature. The system will keep track of how many users click on the tab and this information will be available in your booth space activity report.
- Next in the **URL** section, paste or type in the full path of the page that you wish to link to, beginning with "http://".
- Finally, click "**Save Changes**".

Note: You can preview the external web page URLs by clicking on the magnifying glass icon next to the URL field.

OPTION C – RAW HTML:
Used to display a custom HTML page.

To add a custom HTML page:
- Enter the tab name in the **"Title"** field. This title will appear on the tab that is created.
- Enter a number in the **"Display Order"** field. This number determines how your tabs will be sorted: lower number tabs appear at the top.
- In the **"Content Type"** area drop down menu, choose **"Raw HTML Content"**.
- Activate the **"Track Visits"** checkbox to enable this reporting feature. The system will keep track of how many users click on the tab and this information will be available in your booth space activity report.
- In the **HTML** section, paste or type in the HTML code that you want your tab to display.
- Finally, click **"Save Changes"**.

The following are additional **Optional Features that may be available at this step.******

ADDITIONAL OPTIONS

OPTION A – CHAT ROOM: Used to link your tab to a private chat room.

Note: If your booth space layout has a chat room enabled, there will be an additional tab that expands to display the chat room. A chat room added in the Tab Content step will list the chat room title in the "Content" tab. These two-chat room display areas can be set up to link to different chat rooms or the same chat room.

- Enter the tab name in the **"Title"** field. The title will appear on the tab that is created.
- Enter a number in the **"Display Order"** field. This number determines how your tabs will be sorted: lower number tabs appear at the top.
- In the **"Content Type"** area drop down menu, choose **"Chat Room"**.
- Activate the **"Track Visits"** checkbox to enable this reporting feature. The system will keep track of how many users click on the tab and this information will be available in your booth space activity report.

- In the "**Select Room**" drop-down menu, choose the chat room that you would like your tab to link to or select **"Add New"** to create a chat room. You can create multiple chat rooms using the **"Add New"** button.
- Click **"Save Changes"**. The created chat rooms will automatically be assigned to the tab content when you save.

OPTION B – RSS READER: Used to display an RSS feed.

- Enter the tab name in the **"Title"** field. This title will appear on the tab that is created.
- Enter a number in the **"Display Order"** field. This number determines how your tabs will be sorted: lower number tabs appear at the top.
- Activate the **"Track Visits"** checkbox to enable this reporting feature. The system will keep track of how many users click on the tab and this information will be available in your booth space activity report.
- In the **"Content Type"** area drop down menu, choose **"RSS Reader"**.
- In the **"Item Display Limit"** section, enter the number of items that you want to display from your RSS feed.
- Select **"Show Description"** if you want to display the description text for each RSS feed item.
- In the **"RSS Feed URL"** section, enter the URL to your RSS Feed.
- Click **"Save Changes"**.

OPTION C – SOCIAL MEDIA: Used to display various Social Media Features.

- Enter the tab name in the **"Title"** field. This title will appear on the tab that is created.
- Enter a number in the **"Display Order"** field. This number determines how your tabs will be sorted: lower number tabs appear at the top.
- Activate the **"Track Visits"** checkbox to enable this reporting feature. The system will keep track of how many users click on the tab and this information will be available in your booth space activity report.
- In the **"Content Type"** area drop down menu, choose **"Social Media"**.
- Click **"Save Changes"**.

Social Media Configuration:
   Enable Twitter
   - The Twitter Feature provides the ability to pull Tweets with a selected hashtag into the environment. Via Twitter, users can also Tweet from the event.
   - The Disable Tweet Feature will remove icons which allow a user to Tweet from within the event. The icons display in the default profile edit space and the chat status menu that appears in the lower-right corner of the event window. This feature will not remove the "Send Tweet" button from the attendee or sponsor user profile display.
   - The Event Hashtag is an identifier used to classify Tweets and create a feed of Tweets from Twitter. The Hashtag is preceded by "#" (i.e. #INXPO or #INXPOLIVE). The Event Hashtag implemented in this area will automatically append to all tweets posted from within the environment. The Hashtag has a limit of 140 characters.
   - Enable Twitter is a checkbox that will implement the Twitter Feature in the Social Suite. Once Twitter is enabled, the Twitter configuration options will appear which provide administrators additional selections to control the behavior and appearance of the Twitter widget.

- o Properties is a Twitter Menu that contains the Twitter abilities within the event environment:
    - Hashtag/Search is an identifier used to classify Tweets and create a feed of Tweets from Twitter. The Hashtag is preceded by "#" (i.e. #INXPO). The Event Hashtag implemented in this area will pull all Tweets from Twitter with the specific Hashtag appended if the "Search by Hashtag" radio button is selected. The Hashtag has a limit of 140 characters.
    - "**Allow Attendee to Tweet**" will enable the Tweet Button within the Social Suite that provides the ability for users to Tweet directly from the Twitter Widget.
    - "**Display Twitter Avatars**" will display the avatars of Twitter users from their Twitter pages. The Twitter Avatars will display next to each Tweet in the Twitter Widget.
    - "**@UserName**" will insert the Host Username in the attendee tweet, next to the Hashtag. If no @UserName is inserted, then the default will appear.
- o Shell Colors is a Twitter Menu that provides the text and background color options for the Twitter Widget. Type the HEX Code of the colors within the Text Box (i.e. #000000) or optionally select the Color Picker.
- o Font Colors is a Twitter menu that provides the font color options for the Twitter Widget. Type the HEX Code of the colors within the Text Box (i.e. #000000) or optionally select the Color Picker.

Enable Facebook
- o The Facebook Feature provides the ability to allow attendees and exhibitors to post to their Facebook Wall directly from the Social Suite area of the virtual environment. The Facebook Feature will create a feed of the posts posted from within the environment.
- o Enable Facebook is a checkbox that will implement the Facebook Feature in the Social Suite.
- o The Facebook Feature provides the ability to allow attendees and exhibitors to post to the Facebook Page specified directly from the Social Suite area of the virtual environment. The Facebook Feature will display a feed of the posts posted from within and outside of the environment. A "Like" button will also display to allow the participants to like the page and comment on the page and posts shown.
- o The Facebook Page ID is the title of the page or ID, shown in the Facebook URL. The Facebook Page streams Facebook Posts made on the page within the Social Suite. The Page ID is an identifier that allows the Facebook posts and comments to be streamed within the Social Suite.

Enable LinkedIn
- o The LinkedIn Feature provides the ability to allow attendees and exhibitors to view their LinkedIn Contacts directly from the Social Suite area of the event. The LinkedIn Feature shows those contacts that are currently logged-in to the event environment. Once enabled, no other action is required by an administrator.

Enable INXPO Chat
- o The INXPO Chat Feature provides the ability to allow attendees and exhibitors to Chat directly from the Social Suite area of the virtual environment. The INXPO Chat Feature can be linked to an existing chat area or a new chat room can be created.

- From the Group Chat Drop Down Menu, <u>if an existing chat room has not been created</u>, select "(create a group chat)". The Edit Group Chat Menu will appear.
    - The Title of the Chat Room will appear to event attendees and exhibitors. The Title will be displayed in the event environment at the top of the Group Chat area in the following format: "[**Username**], you have joined [**Chat Title**]."
    - Active should be checked for any chat room used within the Social Suite. <u>If Active is unchecked, users will receive an error although the Chat Feature is enabled.</u>
    - Maximum Users Allowed is an option to limit the user capacity of a chat room. "0" will default, placing no capacity on the amount of users that can access the chat room. Insert a numeric value to place a cap on the number of users allowed.
    - The Authorized User List determines which users will have moderator rights to the group chat. Moderators have the ability to remove off-topic or offensive remarks by deleting lines of chat. Once the chat lines are deleted by a moderator within the chat they will still remain in the transcripts. Select the User Finder to locate an existing user that will moderate; or if no moderators will be used, skip this step.
- Room Actions are tools within the Chat Room Editor. The Room Action Buttons will appear after Submit of a new chat room.
    - Reset Room is an action that will remove all lines of chat from the Chat Room. The chat transcript will appear blank in the chat room after Reset. The original lines of chat will remain in the Log Transcript in the VX Platform Admin Console.
    - View Log Transcript is a button that will show all of the chat lines that were entered in the Chat Room. The Log Transcript will contain all of the lines removed by moderators as well as from the Reset Room Button.

Connection Wall
- The Connection Wall Feature allows users to view their connections' event activity directly from the Social Suite area of the event. Attendees and exhibitors can view such items as when a connection logged in, what presentations he attended, documents he accessed and spaces he visited. A user can click any of his connections' activities to be taken directly to the event area. Once enabled, no other action is required by an administrator.

Navigation Bar Position and Color
- The Navigation Bar Position and Color is a menu that provides administrators an opportunity to alter the display of the widget buttons and background within the Social Suite. The Bar Position and Bar color do not change the display of the Social Suite Tab within the Host Space.
- Insert a Navigation Bar Color by typing the HEX Code of the color within the Text Box (i.e. #000000) or optionally select the Color Picker.

OPTION D – BLOG SPACE: Used to link your tab to a private blog space.

Note: A blog space will only display on the "Content" tab unless the exhibitor has a custom booth space layout that is designed to display the blog space similar to a chat room with its own tab.

- Enter the tab name in the **"Title"** field. The title will appear on the tab that is created.

- Enter a number in the **"Display Order"** field. This number determines how your tabs will be sorted: lower number tabs appear at the top.
- In the **"Content Type"** area drop down menu, choose **"Blog Space"**.
- Activate the **"Track Visits"** checkbox to enable this reporting feature. The system will keep track of how many users click on the tab and this information will be available in your sponsor space activity report.
- In the **"Select Blog Space"** drop down menu, choose the blog space that you would like your tab to link to or select **"Add New"** to create a blog space. You can create multiple private blog spaces using the **"Add New"** button.
- Click "**Save Changes**". The created blog spaces will automatically be assigned to the tab content when you save.

Once you have finished setting up and configuring your **Tab Content**, click "**Apply Changes**" to save your work.

You've completed Step 9!

Step 10: Add a Staple Message Attendees Can't Miss

This step allows you to add a short scrolling message in your booth space called a "Marquee Message". The marquee message is typically used to add a welcome message, highlight a special product/deal/promotion, or make an important announcement.

The marquee message does not have a limit, but it is recommended to use no more than 100 characters including spaces. The message <u>**cannot contain**</u> the following characters: *&* (ampersand), *'* (apostrophe), or *"* (quotation marks).

Choose the font color and the background color:
- Option A: Select from Pre-determined Colors
  - Select a color from the drop-down menu of the most popular color choices.

- Option B: Select Custom Colors
  - Click **"Define Custom Color"** button and pick a color from the Color Selection grid.
  - Once you have chosen the color that you want, click **"Save"** in the lower right-hand corner of the Color Selection window.
  - Enter a specific shade of color by entering the six-digit HEX value (i.e. # 40E7D5).
  - Finally, click "**Apply Changes**" to preview your selection in the work area.

Once you have selected your color scheme you will have the capability to adjust the scrolling speed of your message. Please follow the following steps if you need to adjust your scrolling speed:
- Click on one of the colored buttons in the **"Scrolling Speed"** area. For example, the green buttons on the left are for slower speeds, beginning with "Non-Scrolling".
- Once you have decided on your scrolling speed click **"Apply Changes".**

Once you are satisfied with your marquee message, click **"Apply Changes"**.

You've completed Step 10!

This step allows you to add your booth space representatives and register them for the event by configuring their login and password information.

Note: The information you provide in this step will be used as the event login information. However, each staff member will be able to set up and modify their own profiles, including login and contact information, once they log into the event.

IMPORTANT: Not all staff on your team will have access to edit the virtual booth. If you want more than one person to have editing rights, you MUST notify exhibit management. Please inform your staff and provide a walk-through of the booth space prior to the deadline to submit final design edits.

Please follow the below steps to add a staff member:

To add a staff member that already has a profile (typically only the booth administrator):
- Click "**Add New Staffer**"
- Next, select the user's name from the "**Select User**" drop down menu.
- Click "**Save Changes**".

To add a NEW staff member for your booth space:
- First click **"Add New Staffer".**
- Next click **"Create New User".**
- Fill out the following fields –
  - In the "**Personal Info**" tab (required):
    - **Name:** Enter the full name of your new staff member.
    - **Type:** If applicable, select the type of user from the drop-down menu. Typical options include "Staff" and "Administrator".
    - **Email Address:** Provide a valid email address (unique to each member).
    - **Login ID:** Provide the login name the user will use to access the event.
    - **Password:** Create a password for the user
    - **Time Zone:** Select the time zone of that the user works in. All times displayed in the event are adjusted to reflect the user's local time.
- If you would like to add contact information for the new staff member click on "**Contact Info**" (optional):
  - All tabs are optional and may be filled out by the user when they log into the event. You may fill out the contact information if desired.
  - Click **"Save Changes"**.
- The new staff member will now appear in the main **"Space Staff"** window.

To modify an existing staff member's profile:
- The main "**Space Staff**" window displays a list of all the staff members assigned to the virtual booth space.
- Click on the "**Edit**" link on the same row as the staffer's name.
- Modify the user's profile as needed. You may upload the user's picture, if desired.
- Click "**Save Changes**".

Once you have added your booth space staff members and configured their information, click **"Apply Changes"**.

You've completed Step 11!

Step 12: Add Search Words for Attendees to Find Your Company

This step allows you to add all relevant search terms that you think should be associated with your booth space, your content, and/or your staff.

You can specify keywords that will help attendees and fellow exhibitors find your booth space when using the event's search feature.

To add search words to your virtual booth space, simply type in all relevant search terms separated by a comma (i.e. "affiliate, network, consulting") in the main text area window.

During the event, if a user searches for a keyword that you supply in this step, your booth space will be displayed in the search results.

Once finished, click "**Apply Changes**".

You've completed Step 12!

Step 13: How to Post Job Openings at Your Company

This step allows you to set up a list of available job postings within your booth space. When adding a Job Posting, there is a Preview button the user can click to see how the posting will display in the event.

Note: *When featuring Job Postings in your sponsor space, you must set one of your content/tab buttons to be a "Job Posting List" type. See* ***Step 9*** *for more information on creating Tab Content.*

To create a new job posting:
- Click **"Add New".**
- Next, fill out the following information –
  - Job Title
  - Job Description (you can use the Edit HTML feature to format your description)
  - Job Category (select from the drop-down menu)
  - Job Rating (indicate whether or not you want to allow this functionality)
  - Active (select this feature to display this job posting in the event)
  - Confirmation Contact (select from the drop-down menu)
  - Confirmation Type (select from the drop-down menu)
  - Send this person's vCard to all job applicants (select "Yes" or "No")
  - Job Code
  - Salary
  - Job Type (select from the drop-down menu)
  - Job Level
  - Job Location
  - Travel Requirements
  - Allow Telecommute (indicate whether or not you will allow this for your job posting)

- o Will Sponsor HB1 (indicate whether or not you will allow this for your job posting)
- o Requires Citizenship (select from the drop-down menu)
- o Experience
- o Education
- o Custom Response Message for Application Submission
- To save your posting, click **"Save"**.

The new job posting will now appear in the main **Job Postings** window.

To modify an existing job posting:
- The main **Job Posting** window displays a list of all of the job postings that have been created.
  - o Click on the job's title.
  - o Modify the job posting as needed.
  - o Click **"Save Changes"**.

To save your work don't forget to click **"Apply Changes"**.

You've completed Step 13!

GREAT NEWS!

You have completed all steps to create your virtual booth space for

ASHG's 2020 Annual Meeting!