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Familiarize Yourself
Before attending this class, it is recommended that you have reviewed the Mobile App Overview Training and understand its core objectives.

Mobile App Overview
- Determine the best features for you and your organization
- Identify how to organize your event details within the app
- Recognize the different features available in the Event Guide
- Develop an understanding of the attendee experience

Introduction
After completing this training, you will learn the differences between the event level and the app level and where to adjust the settings.
- Identify differences between app-level and event-level edits
- Navigate the EventCenter
- Recognize the steps of the Event Development Process
- Recognize the functionality of the EventCenter Tools

Where does this class fall within the app lifecycle?

Throughout this guide, take note of the . Use the links to access additional resources in the CrowdCompass Knowledge Center.
Navigation
Recall from the Mobile App Overview training that CrowdCompass apps are **multi-event apps**. This means that each app is designed to hold multiple events.

![Organization's App](image)

When updating your app, it’s important to keep this distinction in mind.

**EventCenter Dashboard**
This acts as your homepage upon logging in with your CrowdCompass credentials. This is where you’ll access any of the app level settings and graphics that are required to submit your app.

[Image of EventCenter Dashboard]

---

**Search the Knowledge Center**

[Link to Getting Started]
**App Settings**

To edit all of your general app information, begin by clicking **Edit App** in the EventCenter Dashboard.

This section is where you’ll find all of your app settings and app graphics. When creating a new app, each item is in “**Needed**” Status.

**Configurations**

Edit how your app appears in the app store under the **General Settings** section. Click **Edit** next to General Settings to begin.

On this page, determine how your app will appear in the App Stores.

- **iOS App Store Name and Google Play Store Name** – Enter the name of your App exactly as you wish it to appear in the stores. There are separate character limits for the iOS App Store and the Google Play Store.

- **App Display Name** – This displays directly below the app icon on an attendees’ device homescreen. To avoid this from getting cut off, we recommend it to be under 12 characters.

- **App Store Description** – Summarize your app to attendees. This typically includes information about your events and your organization. We recommend this description to be at least three sentences and it will appear in the iOS App Store and Google Play Store.

- **App Store and Google Play Keywords** – Strategically select words that your attendees will use to search for your app by using words specific to your organization and your event(s). Separate multiple words with a comma.

**ASK YOURSELF:** What information will you enter in for your app?
App Design
In addition to the General Settings, you will also upload all of the required graphics in this section. Each graphic has a specific size requirement based on the type of device.

**NOTE:** All graphics must be uploaded prior to submitting the app.

App Icons
These icons display in the respective App Stores and appear on the attendee’s home screen after downloading the app.

App Splash Screen
After your attendees download your app, this is the first image that displays on their device.

App Backgrounds
Once the App Splash Screen loads, attendees are brought to the Event Directory. Behind all of the Event App Icons is the overall App Background. To adjust the color of the text and menu bar, select **Required Colors** on the left, and enter your own RBG values or choose them from the color wheel.

**TIP:** For backgrounds on Android devices, upload a solid color image since this will tile across the page.

Create your graphics according to the required specifications and save them on your computer. Begin with the **Required App Icons** section on the left, and browse for each image file. Click **Save Images** when finished. Repeat these steps for the **Required App Splash Screens** and the **Required App Backgrounds**.

**NOTE:** Within any design section, the simulator is available to showcase where the image or color will change. The simulator will not reflect your changes.
Event Creation
Now that your app is configured, begin building your events. To create a new event, click **New Event** under you app name in the EventCenter Dashboard.

For each new event, you are required to enter the event name, description, dates, and location. When finished, click **Create New Event**. The next screen that displays is **Your Event Checklist**. Use the **timeline** at the top of the screen to quickly identify the section of your event that you’re editing.

This is an overall summary of the progress you’ve made on your event. Easily view areas that have been finished, still need to be completed and shortcuts to import or export data for each section.

**NOTE**: To edit any of the Event Details (Event Name, Description, Dates, and Location), click **Settings** within the Event Guide Editor.

To review your other events at any time, click **My Events** in the top toolbar.
Data Overview and Import Process

In the Content section, input all of your detailed event information. Items can be added in bulk via the CrowdCompass Data Templates or can be added individually.

**TIP:** Take advantage of both methods by initially importing content in bulk and manually make additions in the EventCenter.

Adding Individual Content

To add individual items within each section, begin by clicking the item name on the left. Then, select **New [Item]** at the top of the screen. On the next screen, complete the individual fields and **Save** your changes. Although each category has slightly different fields, the process will be very similar.

For example, when adding a new Activity, you’ll first click **New Activity**.

Then, you’ll fill out required fields. After entering all of the fields, click **Create Activity**.

![New Activity Form](image)
Importing Your Content

We all know how precious time is, especially when planning all of the different parts of an event. Save time when building your event app and take advantage of the CrowdCompass data templates and import your information.

To add items in bulk, begin by clicking the data category on the left. At the top of the page, select **Import**.

On the next screen, begin the import process. First, download the template. This can be downloaded as a CSV or Excel file and contains all of the columns necessary to successfully complete the import.

If you’re unsure of the fields that are required for the particular data category, click the link to view our documentation and view a pop-up with all of the required fields in the template.

Then, complete the file with all of your items’ information and save the file. Back in CrowdCompass, click **Choose File** and select the completed template that you just saved. To finish the import process, click **Start Import** and watch the individual items add to your data category.

**Search the Knowledge Center**

**Importing Content**

Content Categories

**Organizations**

Add information about any exhibitors, vendors, sponsors, companies, or other entities related to your event. This information will display in your **Exhibitors/Sponsors** section of the Event Guide.

**Search the Knowledge Center**

**Creating and Updating Organizations**

**Activities**

Enter in all of the sessions, meals, or other items that should appear in the **Schedule** section of the Event Guide.

**Search the Knowledge Center**

**Creating and Updating Activities**
Tracks
When your events have a large number of sessions, use tracks to easily organize sessions into different categories. Attendees can choose to view **Schedule by Track** in the **Schedule** section of the Event Guide.

Tags
Used to categorize Organizations, Activities, People, or Pages. In this section, manage all of your tags using the merge and edit actions.

ASK YOURSELF: What information do you want to upload for your content categories? Will it save you time to import the fields?

People
Enter in all of the details for your speakers, presenters, moderators, or keynotes for your event. Once a person is associated to an activity, their details will appear in the **Speakers** section of the Event Guide.

VIP Admin Center
For any organization and people records, you can choose to have speakers, sponsors, and exhibitors make edits to their own profiles. In order for these individuals to make the changes, they must be marked as VIP Admins. Once these individuals as marked as VIP Admins, they need to be sent an invitation to access and edit their profile.

Search the Knowledge Center
**Creating and Updating Tracks**

Search the Knowledge Center
**Creating and Updating People**
Maps
Add any floor plans, tradeshow booth layouts, or venue maps that will be helpful to attendees to navigate your event. This information appears in the Maps section of the Event Guide.

Search the Knowledge Center
Creating and Updating Maps

Geo Locations
Enter the address information for any local attractions, hotels, restaurants, or other important places to enhance the attendee experience. All of these locations will appear in the Area Map found in the Maps section.

Search the Knowledge Center
Creating and Updating Geo Locations

Surveys
Create and manage all of your event surveys in this section. Once created, these can be linked to your Launch icons, or to individual pieces of content such as Sessions, Speakers, and Organizations.

Search the Knowledge Center
Creating Surveys
Banners
Maximize the virtual real estate of your app by using banners across the top of the app. These images rotate across the top of the app to allow for multiple images. Popular images include event, sponsor, or promotional images.

Search the Knowledge Center
Creating and Updating Banners

Pages
If you’re creating custom informational pages with Wi-Fi credentials, directions, or other helpful event resources, dedicate a whole page in the event app. By default, these pages are stored in the About Section of the Event Guide.

Search the Knowledge Center
Creating and Updating Pages
Attendees

Attendees are the people attending your event and downloading your app. In the EventCenter, attendees are broken up into two categories, confirmed and invited.

Confirmed Attendees
Displays a list of all people that have already created their CrowdCompass account and added themselves to the list. This same list of people displays in the Attendees section of the Event Guide.

Invited Attendees
In this section, find the template for importing attendee names to easily invite them to create their account. You can also import registration codes in this section.

Search the Knowledge Center
Inviting Attendees

NOTE: Once a recipient clicks Create Account in the email invitation, they will be moved to the Attendees List.

Schedules
For those who are not using one of our third party integrations, personal itineraries can be imported for attendees using the Schedules template. In the template, you will enter the attendee name, email address, and activity codes for any sessions that should appear in their personal schedule.

ASK YOURSELF: How do you plan updating Attendees’ schedules?

Photo Management
Encourage attendees to share their photos taken from sessions via social media. These photos will also display in the image gallery at the bottom of the session. The Photo Management section displays all photos taken within sessions, allowing you to manage, review, or remove the photos.
Event Design, Graphics, & Launch Icons

Make your event truly personalized in the Design section of the Event Checklist. This is where you’ll customize the look and the feel of the event app.

Theme
Determine the color scheme and icon pack that reflects your brand or your event. Click Save Theming Options when you’ve found your theme and icons.

Colors
Want to adjust some of the colors in your selected theme? Simply click Colors on the left and adjust the color values by entering in the specific values or using the color wheel. If you’re not sure of where the color appears in the app, hover over each item to see it highlighted in a sample app.

ASK YOURSELF: Do you have a color scheme in mind for your event app?
Event Design
Similar to the app level design, each event has its own set of graphics and needs to be saved according to the requirements in the Event Graphics Checklist.

Event Icons
This graphic displays to the left of your event’s name in the app directory as well as in the online version.

Event Splash Screens
This graphic displays while the event app is loading.

Event Backgrounds
The Event Wallpaper Backgrounds display behind the main icons in your Event Guide while the Event Detail Backgrounds display within any of the details pages such as a session or exhibitor background.

NOTE: Based on the event theme selected, default backgrounds will be applied, however, you can create your own custom graphics to upload into your event.

Search the Knowledge Center
Designing Your Event
Customizing Launch Icons

Launch icons are the images displayed on the Event Guide, or the main menu. Enhance your attendee’s experience by carefully choosing the best icon to represent each page. By default, several launch icons will be provided to you, but you can modify, remove, or add new icons of your own.

Within each icon, click the arrow next to the icon to view additional display options.

To change the icon that’s being displayed, click on the image itself.

To adjust the display order of the icons, drag and drop each icon.

To remove an icon altogether, simply click the X.

Want to use a different icon? To add a new icon to your event app, scroll down to the bottom of the icons and click Add a Launch Icon.
Choose the type of Launch Icon to add. Don’t forget to click **Create** and select an image when finished.

**URL**

Enter in a name for the icon and enter the web address to direct attendees.

**List**

Choose to add a Content List or a Custom List.

**Content Lists** display a series of items to your attendees from a particular content section. Choose from one of your categories including Organizations, Activities, People, Maps, or Pages.

**Custom Lists** allow you to provide a set of links or areas to navigate in your app. For example, create an icon with all of your social media links using a custom list.

To do this, begin by clicking **Add a Launch** Icon. Then, select the **List Type** of Icon and choose to create a **Custom List**.

Enter in the Name to display under the app Icon and choose a list to associate. This can be a group of items that already exist or a new list name can be created. Click **Create**.

---

**Custom List**

Once you define your custom list, you will be able to add URLs, content items, or lists to it.

- **Name**: Social Media
  - The name will be shown in the list and header in the app.

- **List**: Social Media Profiles
  - Select an existing list or enter a new custom list name. This will be the internal name of the list. This name will not appear in the app.

  ![Create Button](Create.png)
To add the individual links to this icon, select the folder icon next to the new icon.

Click **Add a List Item** and enter in the desired information. List Items can be URLs, another list, or a content item. Click **Create** when finished.

**What Attendees See**

![Social Media](image)

Each list item opens the social media URL.

**Content Item**

Want to showcase a particular item on the Event Guide? Choose to display a particular item by selecting the category followed by the item.

**Search the Knowledge Center**

*Customizing Launch Icons*

**ASK YOURSELF:** Will you be customizing any of your Launch Icons?
Settings

Security Settings

Hidden
When enabled, this requires the attendee to enter the Event Code into the search bar of the app directory. Once this is entered, the event name will appear in the directory results.

Invite Only
When enabled, only attendees pre-loaded by the planner will be able to see the attendee list and other locked content. Each attendee is required to confirm their pre-loaded information prior to gaining access to the EventCenter.

Password Protected
Password protected events require attendees to enter in a password prior to downloading the event and reviewing your content. Passwords can be created by the planner and will be required for mobile and desktop access to the event.

Share Type

Full Sharing
Allows attendees to share content via the internal feed as well as via their own social networks and email.

Inbound Sharing Only
Allows attendees to only be able to share within the internal feed.

No Sharing
Attendees will not be permitted to share content via the Event Compass, their social networks, or via email.
Previewing Your App

You've added all of your content and uploaded your graphics – now it's time to see what your app looks like!

To preview your event on a mobile device, download the CrowdCompass Directory app from the iOS app store or Google Play store and login with your CrowdCompass credentials. To review your app, simply tap the event name, and the information will download.

To review the web-based version of the event, this can be done directly from the Event Checklist. Simply click View Event from the links on the left.
Marketing Your Event

Marketing the event app is a critical component to its success throughout the lifecycle of the event. Within this section, there are several resources to distribute your app.

**Event URL**
Use this link to view your Online Event Guide, or web-based version of your app. Attendees can review all of the major event content and update their personal settings via this link.

**NOTE:** This is the only method for BlackBerry and Windows Phone users to utilize the app.

**App Download URL**
For users on an iPhone, iPad, or Android device, this link directs them to the app store to download the app.

**QR Images**
In addition to the App Download URL link, utilize our QR Images in your marketing campaigns and additional resources such as emails, social media posts, and flyers. When attendees scan the QR code, they are directed to your online event guide where they can easily navigate to their respective app store.
**Metrics**
Utilize the **Metrics** sections to report on key activities such as the number of banner taps and page views from your attendees. This section can be broken into four main areas, Overview Metrics, Impressions, Technologies, and Advertising.

**Overview**
This set of metrics displays a comprehensive detail of the app’s usage.

**Impressions**
This set of metrics displays a breakdown of impression activity surrounding the app content.

**Technologies**
This set of metrics displays a breakdown of the types of devices used to view your event.

**Advertising**
This set of metrics displays a breakdown of banner activity.

For a detailed listing of all metrics, view the appendix.

? **ASK YOURSELF:** How do you plan on monitoring your event app’s traffic?
Next Steps

Now that you’ve finished the EventCenter training, contact your Product Consultant to let them know that you’re ready to log into your EventCenter account. After you’re logged in, start applying all of your new knowledge by uploading your data and graphics.

Once everything has been uploaded, you will review everything with your Product Consultant prior to submitting your app to the app stores. Remember that all graphics for the app and event level along with the majority of your event content are required for submission.

Support Resources

When you’re new to CrowdCompass, review the information found on the Getting-Started page. Here, you’ll find resources to prepare for your first Project Plan Call, market your app, and helpful video tutorials to update your data and upload graphics.

Getting Started

Go to www.crowdcompass.com/getting-started.shtml to review helpful resources when first joining CrowdCompass.

Additional Resources

As you become more comfortable with your account, review more advanced resources in the CrowdCompass Knowledge Center.

Contact Our Support team

When you’re unable to reach your Relationship Manager, contact our support team at 888.889.3069. 24 hours a day, 5 days a week, Monday through Friday.
Check Your Understanding

1  **True or False:** Each CrowdCompass app is designed to store multiple event apps.

2  Which term best fits the following description, “This acts as your homepage upon logging in with your CrowdCompass credentials. This is where you’ll access any of the app level settings and graphics that are required to submit your app.”?
   A.  Event Extras Menu
   B.  About Icon
   C.  EventCenter Dashboard
   D.  Event Guide

3  Which of the following best describes the Launch Icon?
   A.  This is the graphic seen on the homescreen of the attendee’s mobile device.
   B.  This is the graphic that displays as the app is loading.
   C.  These are the graphics that represent each section of the Event Guide.
   D.  This is the QR code that attendees can scan to download the app.

Ask Yourself

*Write down your answers to prepare for your Project Plan Call.*

When designing your app, you need to give it a name, description, and label. What information will you enter in for your app?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Content Categories store all of the important information your attendees will access within the event app. What information do you want to upload for each category?

**Organizations**

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Launch Icons identify each section of the event guide. You can choose from the standard icons in your icon pack or upload your own. Which option do you think you will use for your event?

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

CrowdCompass Metrics enable you to track and monitor your event app’s traffic. What types of information do you hope to track?

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

Attendees’ schedules can be by integrating Cvent’s API or can be imported directly through the EventCenter. How do you plan on personalizing your attendees’ itineraries?

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

Additional Notes:
Check Your Understanding – Answers

1. **True or False**: Each CrowdCompass app is designed to store multiple event apps.

   **Correct Answer**: *True*

   *CrowdCompass apps are multi-event apps. This means that within one app, mini-apps are created for each event. All events can be accessed within the event directory.*

2. Which term best fits the following description, “This acts as your homepage upon logging in with your CrowdCompass credentials. This is where you’ll access any of the app level settings and graphics that are required to submit your app.”?
   A. Event Extras Menu
   B. About Icon
   C. EventCenter Dashboard
   D. Event Guide

   **Correct Answer**: *C – EventCenter Dashboard*

   *This page will be your key resource when editing your event app. Edit the look and feel of your app, upload the content to display in the app, and monitor your app traffic all within this page!*

3. Which of the following best describes the Launch Icon?
   A. This is the graphic seen on the homescreen of the attendee’s mobile device.
   B. This is the graphic that displays as the app is loading.
   C. These are the graphics that represent each section of the Event Guide.
   D. This is the QR code that attendees can scan to download the app.

   **Correct Answer**: *C – These are the graphics that represent each section of the Event Guide.*

   *Launch icons are visible within the Event Guide. Each icon contains content related to a different topic. By default, several launch icons will already be in your event app, but you can customize, modify, or remove any of these icons.*
## Glossary of Key Terms and Definitions

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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</thead>
<tbody>
<tr>
<td>App Icon</td>
<td>This image displays on the home screen of an attendee’s mobile device. This should reflect your organization’s branding rather than the specific event.</td>
</tr>
<tr>
<td>App Splash Screen</td>
<td>This image displays when an attendee opens the app on their device. This should reflect your organization’s branding rather than the specific event.</td>
</tr>
<tr>
<td>EventCenter Dashboard</td>
<td>This is your homepage to modify all of the event app’s settings.</td>
</tr>
<tr>
<td>Event Checklist</td>
<td>Keeps track of your event app’s progress. Use this as a reference to see what has been completed for your app and what still needs to get done.</td>
</tr>
<tr>
<td>Event Directory</td>
<td>This displays a listing of all of your events available within this app. Each event is accompanied by an Event Icon and description.</td>
</tr>
<tr>
<td>Event Extras</td>
<td>This menu of options is only available to attendees with a CrowdCompass account. It offers shortcut links to personalized selections for the attendee. Links include: Event Guide, Event Compass, My Schedule, Notifications, My Contacts, My Notes, and Twitter.</td>
</tr>
<tr>
<td>Event Guide</td>
<td>This is the main menu that attendees see when clicking into the Event app via the Event Directory. The icons available can be customized or modified for your event’s needs. The default icons include: Schedule, Speakers, Exhibitors/Sponsors, Maps, About, QR Scanner, and Search.</td>
</tr>
<tr>
<td>Event Icon</td>
<td>This icon displays in the Event Directory. This image should reflect the specific event.</td>
</tr>
<tr>
<td>Event Splash Screen</td>
<td>This image displays upon tapping the Event from the Event Directory. This image should reflect the specific event.</td>
</tr>
<tr>
<td>Launch Icon</td>
<td>Icon used to represent a section of the Event Guide.</td>
</tr>
<tr>
<td>Theme</td>
<td>This represents the color scheme associated to your event app. In addition to the theme, you’ll choose a set of icons or icon pack to go with your app.</td>
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</table>
Appendix A – Metrics

Overview
In this section, view summary data about your event. The metrics can be broken into three sections, Event Starts, Event Breakdown, and Event Activity.

Event Starts
Quickly view how many times the event was opened from the event icon via the app level.

Event Breakdown
Quickly view how the number of items entered in each data category. The categories include Users, Organizations, Activities, People, Maps, Geo Locations, and Attendees.

Event Activity
- Event Starts – displays the number of times the event was opened via the event icon in the app level.
- Checkins – displays the number of attendees that checked into an activity.
- Average Usage – the average amount of time a user spent in the app.
- Detail Views – displays the number of detail pages that were viewed.
- Views/User – displays the average number of detail pages viewed by a user.
- Bookmarks – displays the total number of items that were bookmarked.
- Bookmarks/Users – displays the average number of bookmarked items for a user.
- Scheduled Items – displays the total number of activities added to a user’s schedule.
- Scheduled Items/User – displays the average number of items added to a user’s schedule.
- Notes Taken – displays the total number of notes taken.
- Notes Taken/User – displays the average number of notes taken by a user.
**Impressions**

In this section, view a breakdown of activity surrounding the app content.

The top section displays the content views. Quickly select the type of content to view and see the impressions, or page views from the app.

In the Top Ten Pie Chart, view the top ten viewed items and their total number of impressions. The **impressions** can be segmented by the number of times an item was viewed, bookmarked, scheduled, or attended (check-ins).
Technology
In this section, view a breakdown of the types of devices used to view your event. From the Type dropdown, choose to display the breakdown for Operating Systems, Devices, or Browsers. Each output displays in a line graph and a pie chart.

- **Operating Systems** – breaks down the number of users viewing the app for each operating system.

  The **iPhone OS** indicates the app was being viewed directly from the device and **iOS** indicates that the Online Event Guide was visited via an iOS device.

- **Devices** – breaks down the specific devices that downloaded the app or viewed the Online Event Guide.

- **Browsers** – breaks down the different browser types that viewed the Online Event Guide.

![Graph showing detail page views](image)

![Pie chart showing browser impressions](image)
Advertising
In this section, quickly view the number of times that banners were viewed or tapped.

- **Banners Viewed** – displays the total number of times that all banners were viewed.
- **Banners Viewed/User** – displays the average number of times that each user viewed your banners.
- **Banners Tapped** – displays the total number of times that all banners were tapped.
- **Banners Tapped/User** – displays the average number of times that each user tapped the banner.