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Introduction
This class provides an overview of the functionality included in CrowdCompass apps.

After completing this training, you will have a basic understanding of the app’s features. You will be able to:

- 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

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.
Mobile App Basics

What is a native app?
CrowdCompass apps are native for both iOS and Android users. This means that once an attendee downloads the event content, they do not have to be connected to the internet to review the information.

If the event organizer makes any updates to the event content after the attendee downloads the app, they will need to re-connect to view the changes.

What’s the difference between iOS vs. Android?
iOS and Android are the two most common operating systems for smartphones. iOS is the operating system for all Apple devices including iPhones and iPads. The Android operating system was developed by Google and can be found on various devices manufacturers, such as Samsung.

Apps for iOS are downloaded from the AppStore and apps for Android are downloaded from GooglePlay. When your app is ready, it will be submitted to both of these stores.

How can people access the information on the app?
Each CrowdCompass event also includes a web-based version of the same content, referred to as the Online Event Guide. This provides another way to access the event content for those attendees without smartphones or those using Blackberry and Windows devices. The Online Event Guide is accessed through a mobile or desktop browser and requires the attendee to be connected to the internet.
**App vs. Event**

All CrowdCompass apps are designed to store multiple events. You can think of each event app as a mini-app stored within the account app.

This enables attendees to easily access all of the event content along with any personal notes for each of your events that they attend.

Upon downloading the app, the attendee first sees the app level graphics. The **App Icon** lives on their home-screen while the **App Splash Screen** shows while the app is loading.

**TIP:** When deciding on your app graphics, these should represent your whole organization rather than a specific event.

After the app is open, a chronological list of events displays, known as your app’s **Event Directory**. To download the content for each individual event, attendees will simply tap on the event name. This launches the event on the attendee’s device.

Similar to the app level, the event also has its own icon and splash screen. The **Event Icon** appears next to the event name in the directory listing and the **Event Splash Screen** shows upon opening the event.

Once the attendee opens the event, they’ll access the **Event Guide** and the **Event Extras**, which will be discussed in greater depth in this guide.

**NOTE:** Edits can be made at the app level up until the time of final approval for submission. If changes need to be made after the submission, the app will require re-submission for updates to take effect.
Event Guide and Default Menu Options

After opening the event in your app, your attendees are brought to the Event Guide. Here you’ll see the main menu of icons. In this section, we will define each of the provided default menu options.

NOTE: In addition to the default menu options that we provide, you can create new icons of your own, or modify or remove any of the existing options.
Schedule

The schedule icon stores any sessions or activities happening at your event. Tapping this icon allows attendees to view the event’s schedule by day, track or topic, or by speaker.

In addition to viewing the entire event schedule, they can also bookmark sessions. When attendees aren’t sure of what sessions they want to attend, they can bookmark the sessions that sound interesting by selecting and review them later.

1. **Add to Schedule and Check In** – Attendees can choose to add sessions to their personal schedule. After the session starts, they will have the option to Check-in.

2. **Rate the Session** – Rate the session using a 5-star scale.

3. **Take Notes** – Attendees can write any notes directly from their device for this session. These will appear in the My Notes of the Event Extras.

4. **Bookmark** – Have attendees mark this session as one that they’re interested in. These sessions will appear in the Bookmarked Activities list, under the Schedule icon.

5. **View the Location** – This icon opens the Venue Map to let attendees know exactly where they need to go.

6. **Set a Reminder** – Before the session happens, have attendees set up a reminder so they don’t forget!

7. **Take a Picture** – Attendees can easily open their camera from the app to take any pictures from the session.

8. **Session Details** – Quickly review all of the session information. Details include: Session Name, Date and Time, Location, Description, Speaker Information, Images, and Relevant Documents.
Speakers

Speaker profiles can be viewed directly within a session or from the **Speakers** icon of the Event Guide. Within the speaker profile, choose to include an image, biography, along with any additional images or documents.

Attendees can easily bookmark their favorite speakers and even write notes within their speaker profiles!

Exhibitors/Sponsors

Exhibitor and Sponsor profiles are displayed in the same way in CrowdCompass, however, they can be separated into two icons, depending on how your event is setup.

Your event’s exhibitors and sponsors can be organized by alphabetically by company name, by category, or by sponsorship level. Within each profile, organizations can provide the following information:

- Organization Logos
- Booth Locations
- Contact Information including Social Media URLs
- Business Description
- Images
- Documents

Similar to sessions and speakers, attendees can bookmark their favorite exhibitors and sponsors and take notes to review later.
Maps

Maps are invaluable to your attendees as they are trying to navigate your event. There are two types of maps that you can include in your app.

Area Map

By default, your event includes a map of the geographic area. It automatically includes a pin of your event’s location. Choose to customize this map with additional pins for local attractions, restaurants, hotels, or other important off-site meeting spaces for attendees.

Interactive Floor Map

Enhance your attendees’ event experience by uploading a floor plan of your venue. Use this map to identify session locations, exhibitor or sponsor booth information, and important common areas.

When an attendee is viewing the session or exhibitor and selects the location icon, they will be brought directly to the pin on this map.

About

Use this section to store informational pages or resources about your event. Popular examples of what to include here are information about this event, about this app, or hotel, travel, or Wi-Fi information.

These pages are native for iPhone, iPad, and Android users, meaning they will be viewed directly from the device rather than opening an internet browser window. Important pages can also be added behind their own icon on the Event Guide.

ASK YOURSELF: What additional resources would be helpful for your attendees?
QR Scanner

Offer your attendees the ability to easily scan QR codes throughout the event by including this in the Event Guide. This can be a tremendous timesaver so they don’t have to open another application on their phone.

Whether you’re using QR codes in marketing collateral or on nametags, attendees can scan this information and the app automatically prompts them to view the web page or create a new contact in their address book.

ASK YOURSELF: Where might you use QR codes throughout your event?

Search

The Search icon opens a text search in which attendees can look for speakers, sessions, or organizations that they may want to learn more about. Each item that is pulled up in the search results acts as a live link to the item page.

Social Media

In addition to the Twitter icon found in the Event Extras menu, choose to set up individual links for each social network, or create a single icon for all of your social media links.

ASK YOURSELF: What social media links do you want to include? Popular examples include Facebook, LinkedIn, Blogs, and YouTube Videos.

Survey

Surveys can be created and managed within the CrowdCompass EventCenter. You’ll have the option to create specific session surveys and overall event surveys. These surveys can be used to collect attendee feedback about your event or to evaluate sessions and speakers on an individual basis.
In addition to the information on the main menu of the Event Guide, attendees have access to the **Event Extras** pull out menu. Similar to popular social media apps, this information offers more attendee-specific details.

To access this menu, attendees will tap 📨 and view the menu to the left.

This brings attendees back to the main menu of icons.

Displays the sessions that have been added to your personal schedule or ones that you have set a reminder for or have bookmarked. Below the sessions, social wall and in-app social share posts will also display. Attendees can also switch to the notifications view to see and push notifications.

Displays the sessions selected by the attendee. Attendees can view their sessions in calendar or list format. Users can also choose to set reminders for sessions and add other items to the in-app calendar here.

Once contact sharing requests are confirmed, their shared contact information will appear here and exported to your native address book.

Any notes that were taken throughout the app are conveniently stored here. For attendees to review their notes outside of the app, they will need to access the online version of the event to easily copy and paste their notes into a word document. Notes can be exported on iOS and android devices. Exporting notes will open an email, auto-populated with a link to your event notes.

Make it easy on your attendees to spread the word about your event via Twitter. Link an account or hashtag in the Twitter Event Extra. If you do not have a Twitter handle or hashtag, this section will not appear.
Check Your Understanding

1. **True or False**: CrowdCompass apps are designed to store multiple events.

2. When an attendee wants to review their notes, bookmarked sessions, or previous push notifications, where should they go?
   A. Event Extras Menu
   B. About Icon
   C. Email the Event Planner
   D. Event Guide

3. Which of the following best describes the Interactive Floor Map?
   A. A geographical map of the area that automatically includes a pin of the venue’s location.
   B. A map of the different locations of the event. Attendees can easily see where sessions and exhibitors are being held.
   C. A GPS map that gives step-by-step instructions for driving to the desired location.
   D. A map that shows all of the home locations of the attendees from the event.

Ask Yourself

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

Recall that you need **two sets of graphics**—app level and event level. We recommend that the app level graphics represent your organization and event level are more specific to the event. Do you have an idea of the graphics that you’d like to use?

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Exhibitors and Sponsors can be combined into one section of the Event Guide or can be separated into two sections. Based on your event setup, which option would work best for your event?

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Two types of maps can be added into your app—**Area Maps or Interactive Floor Maps**. Recall that area maps are of the geographic area and interactive floor maps are floor plans of your event space. Thinking about your event, what areas do you think you'll need a map for?

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**Additional Resources** can be added to your app to provide helpful materials such as travel or Wi-Fi information. What are some additional resources that would benefit your attendees in your app?

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**The QR Code Scanner** makes it easy for your attendees to scan a QR code directly from the app. What are some ways you could utilize QR codes at your event?

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**Are you connected to your attendees? Add a Social Media icon to connect with your attendees via any of your social networks.** What social networks would you want to add to a social media icon in your app?

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**Surveys** are an excellent way to capture your attendees opinions and feedback from your event. They can be added to your app for your overall event or for individual sessions. Which do you think would be a better option for your event?

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**Additional Notes:**
Attendee Perspective
Attendees will be able to add themselves to the list found in the Attendees icon. Determining the best set up for your attendee list depends on your legal requirements, audience type, and bandwidth for managing attendee accounts.

- **Note-Taking** – Attendees can take notes from any session, speaker, or exhibitor and view this information in their account at any time. If an attendee does not have an account, they will be not able to utilize this functionality.
- **Networking Opportunities** – Attendees can join various contact lists and share contact information with other people from the event.
- **Access information from multiple devices** – With an account, attendees can easily access all of their event information from any device at any time!

Setting Up the Attendee List
When creating your attendee list, you can determine if your list should be **Opt-In** or **Invite-Only**.

**Opt-In Method**
This option enables attendees to log into the app and they choose to add themselves to the attendee list. For this method, the attendee list will be open to everyone that has downloaded the app.

**Invite-Only Method**
Unlike the Opt-In Method, planners must upload the list of attendees who should be able to view and add themselves to the list. This option is ideal for private or exclusive events.

Search the Knowledge Center
**Configuring Event Settings**

**Accounts**
Save your attendees time and energy by letting them access all of their materials from device to device throughout the duration of your event. Simply instruct your attendees to sign into the app using their registration code, and they’ll have instant access to their notes and personal event itinerary.

**NOTE:** Attendees can use their registration code to sign into the app and are not required to have a CrowdCompass account.
Logging In
After an attendee creates their account, they can build out their attendee profile. By default, their account will be private, meaning only their Name will display to other attendees via the Attendees icon. When their profile is private, attendees will need to send a request to view their entire profile.

If attendees would prefer for their information to display in the attendees directory, they can change their profile status to Public within their Profile Settings of their account.

Attendee Profiles
After attendees create an account, an attendee profile is created for them. Each attendee’s profile is similar to a digital business card or social media profile page, listing out basic contact information. They can choose for this information to be private or public to the additional attendees.

NOTE: By default, all profiles are set to private when they are created.

Security Options

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.
**Sharing Type**
Determine the level of content that attendees can share via your mobile app. Choose from one of the three levels listed below.

**Full Sharing**
Allows attendees to share content via the internal feed. They can also share through their own social networks and email.

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

**No Sharing**
Attendees will not have the option to share content to the Event Compass, Social Networks, or via email.

**ASK YOURSELF**: Which security option and sharing type will work best for your event?

**Search the Knowledge Center**
**Configuring Event Settings**
Check Your Understanding

1. **True or False:** Attendees can take notes and view personalized information **without** having a CrowdCompass account.

2. When inviting attendees to your event, which of the following best describes the Opt-In method?
   A. This is a password protected list that is sent out by the planner.
   B. Any attendee can download and view the app if they’re attending the event.
   C. Any attendee that the planner has invited can view and download the app.
   D. When an attendee can only view information via social media sharing.

3. Which of the following are possible ways to restrict your event’s security?
   A. Only those who have been invited by the planner can download the event app.
   B. Require a password to be entered before downloading the app.
   C. Disable sharing via Social Media.
   D. All of the Above.

**Ask Yourself**
*Write down your answers to help facilitate your Project Plan Call.*

CrowdCompass offers several different **security options for your event app.** Which do you think would be the best fit for your event? Why?

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People can be invited to your app via the **Opt-In Method** or via **Invitation-Only.** Which of these options would be better for your event? **Why?**

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**Additional Notes:**
What’s Next?

- Sign up for the EventCenter Training
- Review the required data and graphics templates on the Getting Started page.

Be sure to reference your answers from the Ask Yourself questions during your Project Plan Call with your Relationship Manager.
Check Your Understanding – Answers

Event Guide and Default Menu Options

1. True or False: CrowdCompass apps are designed to store multiple events.

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. When an attendee wants to review their notes, bookmarked sessions, or previous push notifications, where should they go?
   A. Event Extras Menu
   B. About Icon
   C. Event Guide
   D. Account Settings

Correct Answer: A—Event Extras Menu

When attendees want to access their personalized selections, they can access all of this information via the Event Extras Menu. Attendees will have to have a CrowdCompass login to view all of this information.

3. Which of the following best describes the Interactive Floor Map?
   A. A geographical map of the area that automatically includes a pin of the venue’s location.
   B. A map of the different locations of the event. Attendees can easily see where sessions and exhibitors are being held.
   C. A GPS map that gives step-by-step instructions for driving to the desired location.
   D. A map that shows all of the home locations of the attendees from the event.

Correct Answer: B—A map of the different locations of the event. Attendees can easily see where sessions and exhibitors are being held.

Make it easy for your attendees to view where all of their sessions are. Upload a floor map and associate an area to each session and sponsor. When an attendee opens the item in the app, they can select the location icon and quickly view they need to be.
Attendee Perspective

1 True or False: Attendees can take notes and view personalized information without having a CrowdCompass account.

Correct Answer: False

In order for attendees to take full advantage of all of the app’s features, they must create their own CrowdCompass account. This will enable them to take notes, view personalized schedule, and connect with other attendees. None of these options are possible without an account.

2 When inviting attendees to your event, which of the following best describes the Opt-In method?
   A. This is a password protected list that is sent out by the planner.
   B. Any attendee can download and view the app if they’re attending the event.
   C. Any attendee that the planner has invited can view and download the app.
   D. When an attendee can only view information via social media sharing.

Correct Answer: B—Any attendee can download and view the app if they’re attending the event.

The Opt-In Method allows all attendees to download the app if they’re attending the event.

3 Which of the following are possible ways to restrict your event’s security?
   A. Only those who have been invited by the planner can download the event app.
   B. Require a password to be entered before downloading the app.
   C. Disable sharing via Social Media.
   D. All of the Above.

Correct Answer: D—All of the Above.

Your event’s security can be restricted by an exclusive invitation list set by the planner, password protected, or can be blocked from any sharing via social media.
## Glossary of Key Terms and Definitions

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<th>Definition</th>
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<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>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>Invite-Only Method</td>
<td>When inviting attendees to the event, planners can choose to restrict the attendee list by uploading the attendee list and inviting them via the EventCenter. Only those on the list will be able to download the app from the app store.</td>
</tr>
<tr>
<td>Opt-In Method</td>
<td>This invitation option enables any attendee that is attending the event to download the app from the app store.</td>
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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, Monday through Friday.