

**Attendee Technical Guidelines**  
**AAPOR 76<sup>th</sup> Annual Conference**  
**May 10-14, 2021**  
*Short Courses May 3-6, 2021*

Thank you for being a part of AAPOR's 76th Annual Conference! This document contains technical information you'll need to know to join the event virtually. If you have any questions, please contact the AAPOR staff team at [info@aapor.org](mailto:info@aapor.org).

This document includes information about each of the following:

- General information
- Before the Event
- During the Event
- After the Event
- FAQs

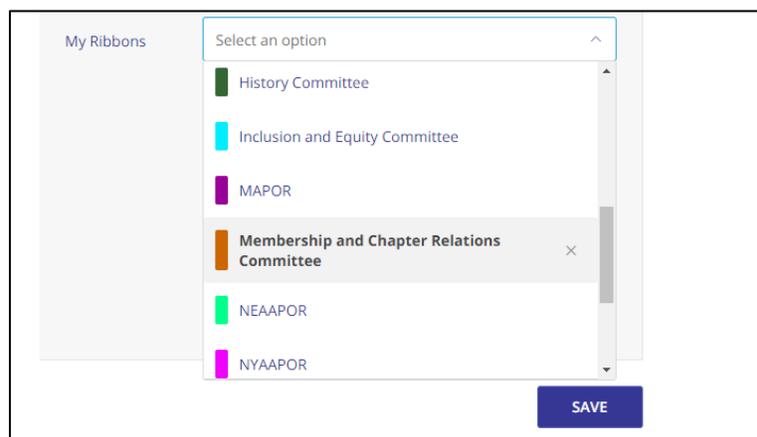
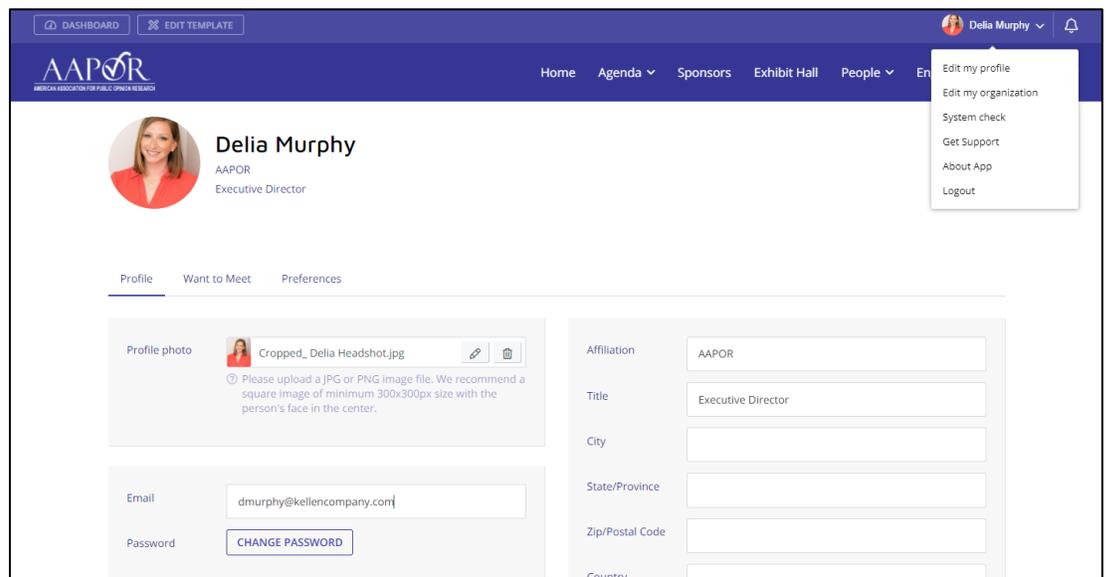
### **General Information**

1. The conference platform is hosted by a company called Pathable which uses Zoom to host live sessions as webinars or meetings.
2. Throughout the conference, there will be a mix of live and prerecorded presentation sessions.
  - Live sessions, including papers, panels, plenaries, and other all-attendee sessions, will be held "webinar" style, where attendees can type comments and questions using the chat feature of Zoom.
  - Other sessions will be held "meeting" style, where attendees and presenters can hear and see each other to engage in conversation. These include live Q&A sessions for prerecorded sessions, round table discussions, coffee breaks, speed networking, and meetings with exhibitors and other attendees.
3. If you do not have a microphone or camera on your computer, you can still listen in using your computer's audio or dial in using your phone to hear the sound. Due to limitations within Zoom, attendees in Safari, Firefox, or other browsers may have to dial in via telephone in order to hear the meeting audio. Telephone dial-in numbers are provided once you join the Zoom session.
4. You will receive an email from Pathable between April 26-30 inviting you to log in to create your conference profile. Logging in and creating your profile prior to the start of the conference will allow you to take advantage of all the platform has to offer.

### **Before Conference Begins**

1. Install Zoom.
  - We recommend getting your computer or laptop set up with Zoom at least several days before the event.
  - Install "Zoom Client for Meetings" at [https://zoom.us/download#client\\_4meeting](https://zoom.us/download#client_4meeting).
  - The conference platform can be accessed and works well in the following internet browsers: Google Chrome, Microsoft Edge and Mozilla FireFox. The platform does not work well in Safari or Internet Explorer so please avoid using these browsers.
  - If you are a federal government employee facing restrictions with using Zoom, we recommend using a personal computer instead of your work computer to access the conference platform.
2. Log in to Pathable, update your profile, and add sessions to your "Agenda."

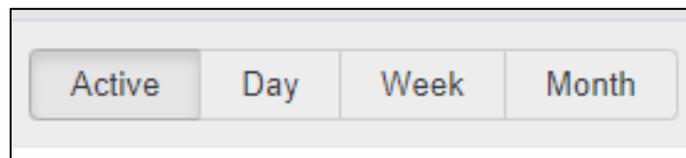
- Between April 26-30, you will receive an email invitation to Pathable. Please note that the invitation will come from [no-reply@pathable.com](mailto:no-reply@pathable.com), so add this domain to your safe senders list or look out for it. The email will contain a link to the conference site. Once on the site, you will be prompted to create a six-character password and accept the site's Terms & Conditions.
- Update your profile
  - To enhance your AAPOR conference experience, take a moment to update your profile by clicking on “Edit My Profile” in the top right corner of the platform. Add information about yourself, including your headshot, social media handles, and bio. You can also further customize your details by adding “ribbons” – these are similar to the ribbons you would add to your badge if we were in person. Be sure to click “save” when you are finished.



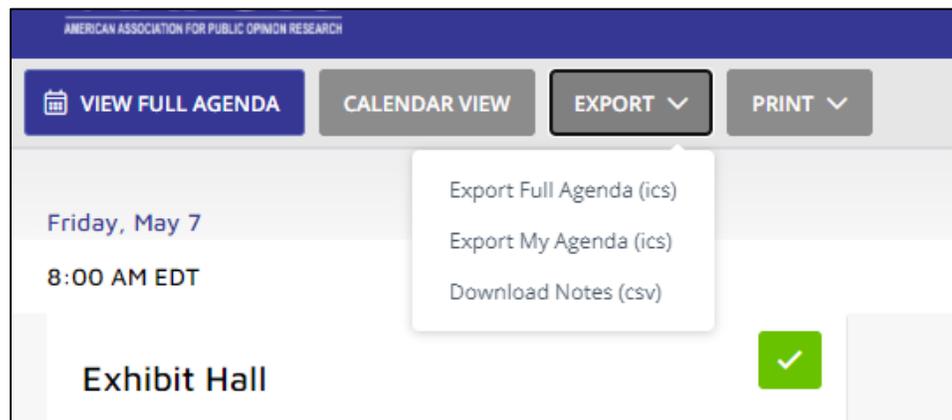
- Review the agenda and add sessions or papers you'd like to attend to “My Agenda.”
  - Start by viewing the complete schedule by clicking on “Schedule” on the top navigation bar; then, select “Agenda.” This will take you to the full

conference schedule. Click into a session to view the description. If you'd like to add a paper, a session, or an event to your agenda, click the purple "+" symbol. This will add the event to your personal agenda which can be found by again clicking "Schedule" on the top navigation bar and selecting "My Agenda." If you want to remove the event from your schedule, hover over the green checkmark and click the red "x" symbol.

- You can use the "Search" feature to search by presenter name, description, conference track, and keywords. Remember to "Reset" (located at the bottom of the search sidebar) after you complete a specific search to clear out your prior search terms.
- The full "Agenda" and "My Agenda" can also be viewed in "Calendar View." "Calendar View" can be customized by clicking "Active", "Day", "Week" and "Month."

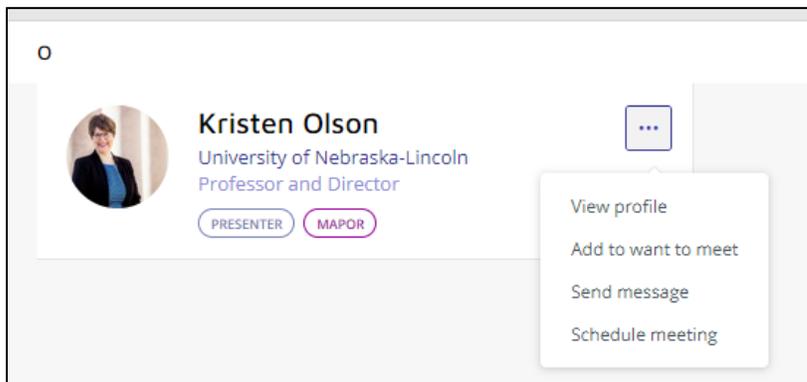


- Export the agenda in a variety of formats to be on your personal calendar. You can also print your agenda using the "print" button.



- Prerecorded sessions are available in the platform before May 11-14 so you can start watching early! If you wish to add a particular prerecorded paper or the Live Q&A for the session to your agenda, you will need to click into the session to see the plus signs to add them to your agenda. Note, you do not need to add papers or sessions to "My Agenda" in order to be able to watch them. This is merely to help you organize your conference experience.
3. Review the [AAPOR Conduct Policy](#) and [Terms of Agreement](#) before attending the AAPOR Annual Conference.
  4. You can see the names and profiles of fellow attendees and presenters by clicking on the "People" tab, then Attendees." Browse through the attendee list and click on the three dots next to each person to "view profile", add attendees to your list of who you want to meet, "send a message", or schedule a meeting (more details provided below).

- You can use the “Search” feature to search attendees by a number of different attributes, including name, affiliation, and ribbons. Remember to “Reset” after you complete a specific search to clear out your prior search terms.

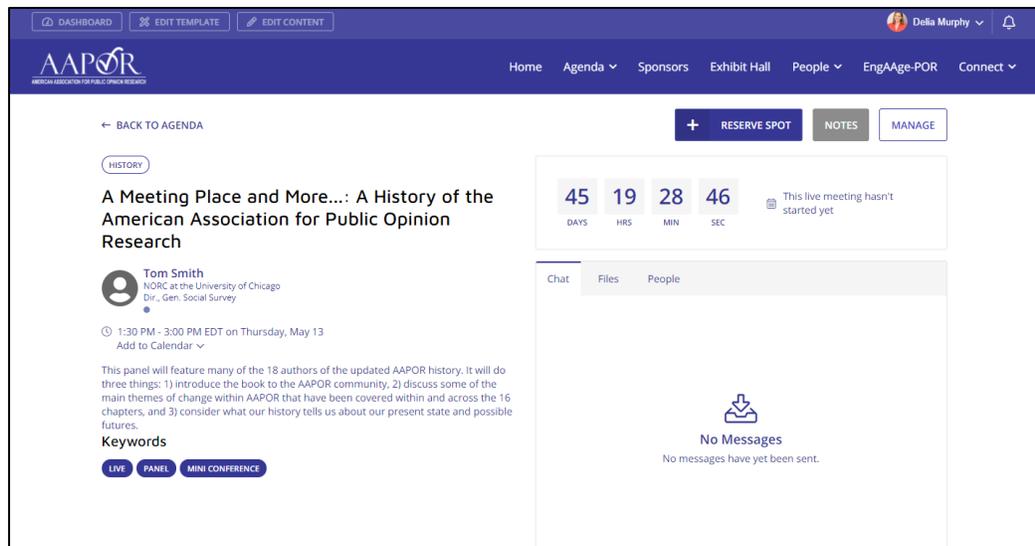


5. Check out the exhibitors and sponsors who make our event possible. In the Exhibit Hall, you can add exhibitors to your “Want to Meet” list and send direct messages to representatives. Adding an exhibitor or sponsor to your “Want to Meet” list will NOT alert them that you want to connect, but will create a “Want to Meet” list for you in your personal profile so you can keep track of who you want to connect with during conference.
6. AAPOR has created a [conference virtual background](#), which you are encouraged to use. *Note: Clicking this link will open the image in your browser. Right click (or tap and hold if you're on a mobile device) to open the menu where you can save the image file.* Download the image and save it to your Zoom background options. If you use the virtual background, make sure the “mirror my video” is un-checked in your Zoom background and filters settings; the background will otherwise appear backwards on your screen, although it will look fine to others who see you. *Note: Clicking the link above will open the image in your browser. Right click (or tap and hold if you're on a mobile device) to open the menu where you can save the image file.*

### During Conference

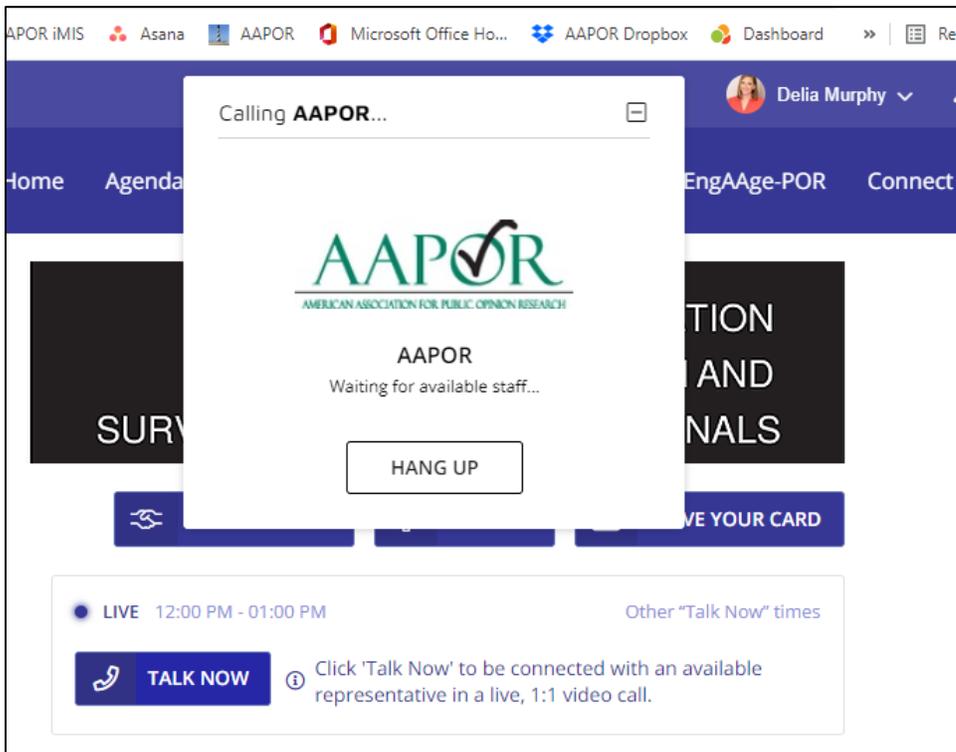
1. If you purchased a spot in a short course the week of May 3, when you sign into the conference platform, the short course will automatically show up in “My Agenda.” Access the short course by clicking on the session at the time it is scheduled to start and click “Join Meeting.” Short courses are limited only to attendees who pre-registered to attend and will not be visible on the agenda for anyone not registered to attend.
2. If you are a member of an AAPOR Committee, your Committee may have a meeting scheduled for the week of May 3. If so, the meeting will automatically show up in “My Agenda” for you to attend. There are several meetings also taking place the week of May 3 that are open for any attendee to join, including Affinity Group meetings and a kick-off meeting for the Inclusion and Equity Committee. Check the schedule in the conference platform for more information about these open meetings.
3. Join the AAPOR Conference Information Session: How to Get the Most Out of the Conference on May 10 from 12:00 PM – 1:30 PM ET to hear an overview of the conference, a “how to” guided tour of the conference platform, with a chance for you to ask questions about AAPOR, the conference, and the technology for this year’s conference.

4. If you register for the AAPOR conference after May 10, there may be about a 20-minute delay before you will be able to log in to the Pathable platform. If you need to get in sooner than that, you should contact [info@aapor.org](mailto:info@aapor.org) and AAPOR staff can manually send you your login credentials.
5. How to join sessions and ask questions
  - You can continue to add and remove sessions from “My Agenda” throughout the AAPOR Annual Conference.
  - Although prerecorded papers are assigned to sessions, you can watch them at any time before, during, or after conference. Keep in mind the timing of the 30-minute live Q&A sessions for prerecorded papers, occurring at the end of the scheduled time.
  - When you are able to join a live session scheduled for a specific time, a button marked “Join Meeting” will appear in the upper right-hand corner of the screen. You will click the “Join Meeting” button to enter the session. Before the meeting is scheduled to start, this space will say “This live meeting hasn’t started yet.” The session will not open until approximately one minute prior to its scheduled start time. Once you click on “Join Meeting,” a new tab will be launched with the Zoom meeting outside the platform.
  - Many sessions will have handouts, additional materials, and PDF presentation files from presenters that you can download and save included in the “Files” section on each session page. You will be able to download and save these files, if you choose.
  - You can take notes on each session within the platform by clicking on the “Notes” button. You will be able to download the notes that you take on each session locally. To download your notes, click export on the agenda page, then choose “Download Notes” from the dropdown menu. You will be able to download your notes in a .csv file, organized by the session.
  - In addition to the chat function inside a live Zoom meeting or webinar, there is a chat feature on the session page inside the conference platform. Use the chat function to interact with other attendees. You can post to this chat board at any time before, during or after the session time.
  - To ask questions during a live session (either in the Zoom meeting or webinar), use the chat box, “Raise Hand” feature, or chat function. Some live sessions may have the chat feature in Zoom disabled to allow attendees to focus on the presentations.
  - You can also send a direct message to a presenter in the conference platform if you have specific questions.



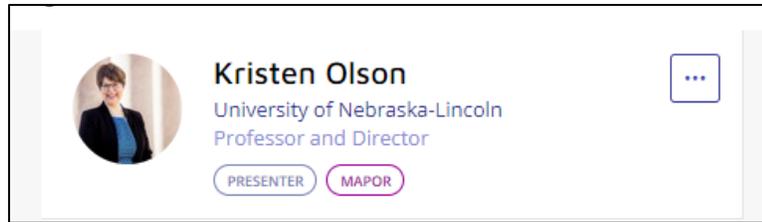
6. How to participate in EngAAge-POR
  - EngAAge-POR is the gamification part of conference where you can earn points by taking advantage of all that the conference platform has to offer. On the EngAAge-POR tab, you can see the types of activities that earn points, such as updating your profile, engaging with sponsors, and attending sessions. Many of these activities will earn points every time you do them and your points will automatically be added to your profile. At the end of the conference, the top 20 participants as of 12:00 pm ET on Friday, May 14 on the leaderboard will be eligible to win prizes that will be given out during the Annual Business Meeting.
7. How to connect with other attendees on the discussion boards in the “Conversations” tab
  - On the “Connect” tab, click on “Conversations” to explore and participate in AAPOR discussion boards on different topics. Within each board, you can reply to an existing thread or click “New Conversation” to start a new thread. You can also add photos and “like” posts.
  - On the “Connect” tab, click on “Social Wall” to see the live Twitter feed for #AAPOR. Even if you do not have a Twitter account, you will be able to see all tweets with the hashtag #AAPOR from before, during, and after the conference.
  - Click on the “Inbox” within the Connect tab to send or view private messages sent between yourself and other attendees.
8. How to visit the Sponsor Pages and Exhibit Hall and Participate in Talk Now during Exhibit Hall Hours
  - At any time before or during the conference, you can check out Sponsor Pages and the Exhibit Hall to see information from AAPOR’s valued sponsors and exhibitors. You can view their videos, download their information, leave your virtual business card to connect later or become eligible for raffle prizes the exhibitor might be providing, and schedule direct meetings with their representatives. At any time before or during conference, you can schedule a private meeting with exhibitors or sponsors (see section 9 below for how to schedule one-on-one meetings).
  - On May 11-14, there are designated times in the schedule to join the Exhibit Hall Hours and connect with the exhibitors. During these 30-minute time slots, a “Talk Now” button will be available in each exhibit booth, which you can click to automatically launch a meeting with a booth staff member. Clicking on “Talk

Now” will launch a window within the platform while you are being connected with a booth staff member. You can minimize this window while waiting for your call to connect and access it again by clicking on the call box located in the desktop header at the top of the platform site. If the first booth staff member does not pick up the call, the system will automatically move on to the next available staff member. If no booth staff member is available at that time to take your call, you will have two options: to schedule a private meeting with a booth staff member or to send a private message.

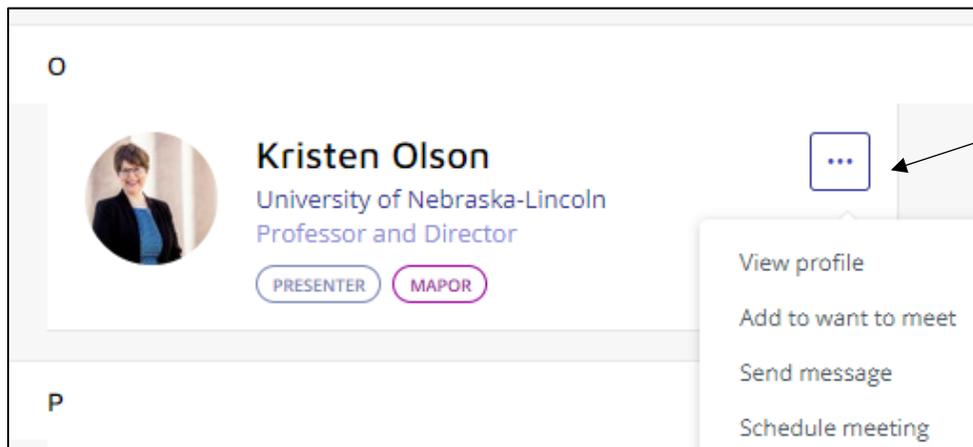


9. How to schedule one-on-one meetings

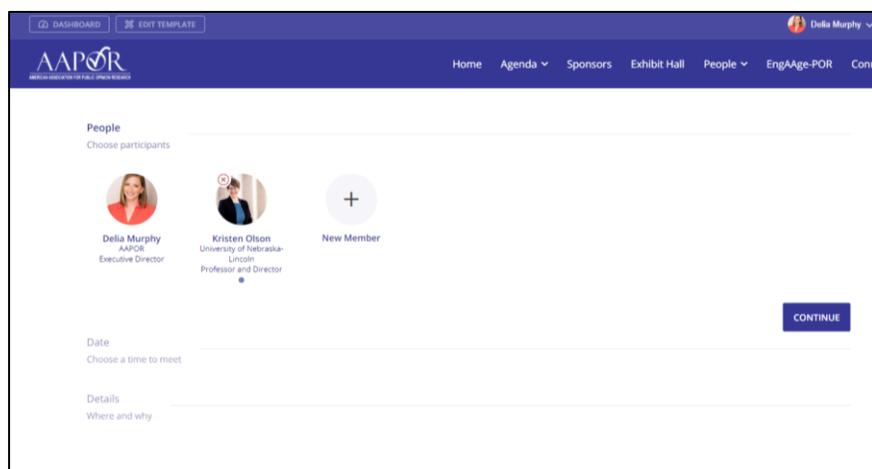
- To request a private meeting with anyone, use the “People” tab in the main navigation bar.
- On the dropdown menu, select “Attendees” (this option will include both speakers and attendees)
- You will see a selection of “cards” for attendees, which look like this:



- Clicking on the card will take you into that attendee's profile. By clicking on the ellipsis in the upper right-hand corner of the card, you will see four options:



- You may view the person's profile, add them to your "want to meet" list, send them a message or schedule a meeting. Adding an attendee to your "Want to Meet" list will NOT alert them that you want to connect, but will create a "Want to Meet" list for you in your personal profile so you can keep track of who you want to connect with during conference.
- Clicking on the fourth option will take you to the "Schedule Meeting" screen, where you can request a meeting. You can add additional people to this meeting, if you want. Click on "continue", and it will show your calendar and the other person's calendar on the platform to schedule a meeting. You will see the dates and times available, and can set a meeting invitation for the date and length of time that you want to request by clicking the "edit" button on the right. Then, click next and enter the name of the meeting and a description. An email invitation will be sent to the person you want to meet with. This meeting will be automatically added to your calendar. When the other person accepts the meeting, you can access the meeting on each of your calendars. Join the meeting through a "join meeting" button that will appear at the time of the requested meeting.



- Scheduling a meeting with a sponsor or exhibitor can be done through the same process of scheduling a one-on-one meeting with another attendee. Alternatively, if you visit a virtual exhibit booth, you can click on “Leave Your Card” which will share your contact information with the sponsor or exhibitor so they can reach out to you. Clicking on the “Want to Meet” button in an exhibit booth will add the sponsor or exhibitor to your “Want to Meet” list in your personal profile so you can keep track of who you want to connect with during conference. It will NOT alert the sponsor or exhibitor that you added them to your “Want to Meet” list.



### After Conference Ends:

1. Bookmark the AAPOR Conference Platform (Pathable) website, as session recordings, presentation slides, handouts, and sponsor pages and exhibit hall will be available through March 2022.
2. Keep the conversation going! You can still visit exhibit booths and reach out to sponsors through the platform and connect with presenters after watching their sessions. You can also keep talking with attendees on Twitter using #AAPOR.

### Technical FAQs:

Who do I reach out to for help?

- During the event, you can get technical questions answered by either clicking on the “Need Help? Get Support” link on the top tab in the platform or hover over “Connect” and click the “Pathable Support” section. You can also email [info@aapor.org](mailto:info@aapor.org).
- Before or after the event, if you have questions about registration, content, or other AAPOR questions, contact the AAPOR staff team at [info@aapor.org](mailto:info@aapor.org).

What if my updates didn't save?

- Some updates in the conference platform can take a few minutes, such as adding agenda items to "My Schedule", so give the system a few minutes or refresh the page, if needed.
- If the conference platform seems frozen, please refresh the page.

Why isn't the search feature working as expected?

- If you use the conference platform search function and filter it, please note it will stay filtered until you change it back or use the "x" to clear it. If you fail to change it back, it may look like items are missing.

Other conference questions? See other conference-related FAQs at:

<https://www.aapor.org/Conference-Events/Annual-Meeting/2021-Conference-FAQs.aspx>.