



UNBRIDLED

RESUME 2.0.0 DOCUMENTATION

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QUICK SETUP GUIDE

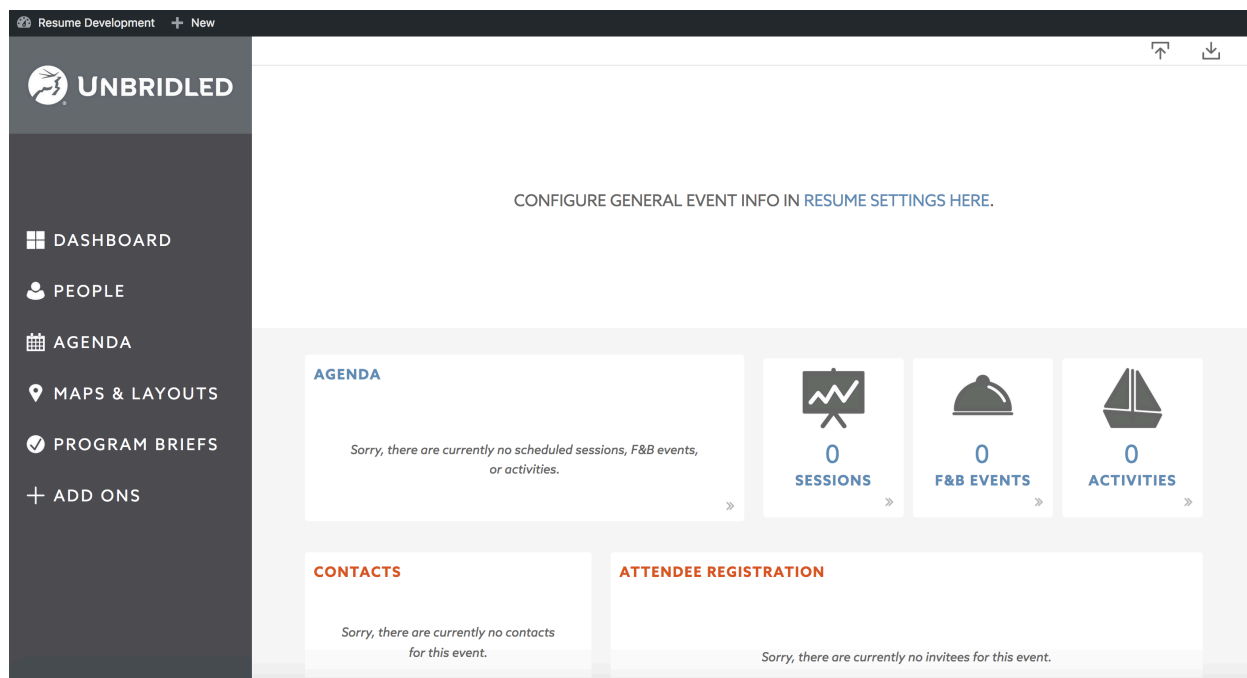
1. Request a new Resume through Unbridled.in. Once the Resume is created by the IO team, you will receive an email with admin login credentials. Navigate to the site and login with the account credentials provided in the email.
2. From the backend of the site, configure resume settings (page 6) and dashboard visibility settings (page 8).
3. User Accounts
 - a. From the backend of the site, click "Users" in the left nav.
 - b. Click "Add New" to add a new user account.
 - c. Complete the form, making sure to select the appropriate role for each new user (XM Admin, Project Manager, Planner, or Client).
 - d. You will also need to either 1) save the password that you created for this new user and email it to them, or 2) let WordPress automatically email the password to the new user by leaving the Send User Notifications checkbox selected.
4. Locations Import
 - a. **Note: Meeting Spaces cannot be mapped to Venues via the Venue ID column unless Venues are uploaded into the site BEFORE Meeting Spaces.*
 - b. Download a Blank Location Grid via the Import page → Maps & Layouts page → Blank Location Template button.
 - c. Use the Blank Locations Grid to fill in location data for import.
 - d. Import the completed Locations grid to the resume site via the Import page → Maps & Layouts page → (browse for file to upload). Watch for error messages to ensure data is uploaded correctly.
 - e. Repeat this process for the Meeting Spaces import.
5. Agenda Import
 - a. **Note: Agenda items cannot be mapped to specific locations via the Venue ID or Meeting Space ID column unless these locations are first uploaded into the site BEFORE the agenda import.*
 - b. Download a Blank Session Grid via the Import page → Agenda page → Blank Session Grid button.
 - c. Use the Blank Session Grid to fill in session data for import.
 - d. Import the completed Sessions grid to the resume site via the Import page → Agenda page → (select Sessions and browse for file to upload). Watch for error messages to ensure data is uploaded correctly.
 - e. Repeat this process for F&B grid import.
 - f. Repeat again for Activity grid import (if applicable).
6. Contacts

- a. From the backend of the site, click "Contacts" in the left nav. There you will find pre-loaded contacts in "draft" mode. Check the boxes next to all contacts you'd like to enable for this resume. At the top of the table, use the drop down to select "Edit" then change the Status to "Published."
 - b. To add additional contacts that were not already pre-loaded, first download Existing Contacts via the Import page → People page → Existing Contact Data button.
 - c. Add additional rows to this grid for all new contacts.
 - d. Import the completed Contacts grid to the resume site via the Import page → People page → (select Contacts and browse for file to upload). Watch for error messages to ensure data is uploaded correctly.
7. Attendees
- a. Download a Blank Attendee Grid via the Import page → People page → Blank Attendee Template button.
 - b. Use the Blank Attendee Grid to fill in attendee data for import.
 - c. Import the completed Attendees grid to the resume site via the Import page → People page → (select Attendees and browse for file to upload). Watch for error messages to ensure data is uploaded correctly.
8. Program Briefs
- a. From the backend of the site, click "Program Briefs" from the left nav.
 - b. A few (blank) standard program briefs will already be available to click on and complete. Or you can choose to "Add New" Program Brief.
 - c. Complete the form with Program Brief info (leaving blank any fields that are not relevant).
 - d. If you'd like to hide any Program Briefs from client view, be sure to check the Visibility checkbox near the top of the form.

For complete instructions and walkthroughs, continue reading the full Resume Documentation below.

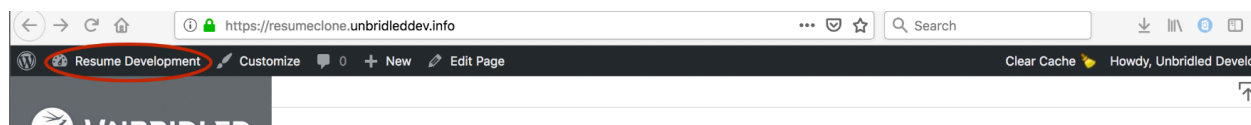
RESUME SETTINGS AND DASHBOARD

To begin setting up a new resume site, navigate to the program-specific URL given to you by the Unbridled IO Team and login with the username and password provided. Once logged in, you will see a blank resume dashboard. As you've started to configure settings and have begun to import data, the dashboard will populate with program information, data summaries and quick links for your use.

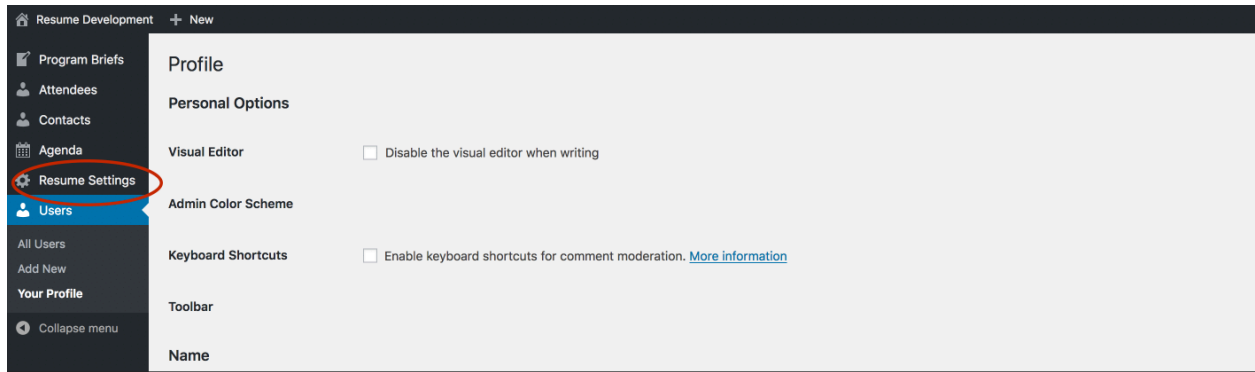


Configure Resume Settings

In order to configure basic event settings (such as name, program summary, etc.), navigate to the WordPress backend by clicking on the program name in the upper left-hand corner of your screen.



Click "Resume Settings" from the left-hand navigation menu.



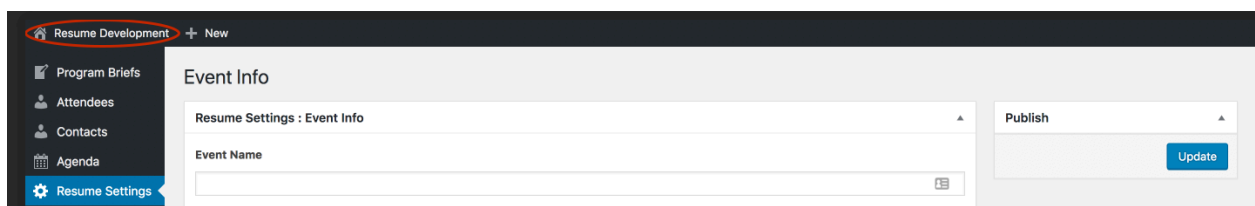
Under Event Info, fill in event name and start/end date and time information. *Start date and time entered here will dictate time until the program begins for your Dashboard Countdown Clock.* From the time zone dropdown, please choose the time zone where your program will take place. Additionally, here is where you will upload the client's logo or event logo along with adding other details such as program summary, venue name and venue address. You can also attach a rainbow and/or program agenda here to be made readily available on the Dashboard.

**Note: when a user clicks to open a PDF anywhere in the Resume, a new tab will open in their browser to display the document. Here they will have the ability to view, download to their computer or print. When a user clicks to open an Excel or Word file anywhere in the Resume, the file will directly download to their computer or, if they are using a mobile device, a display will appear asking them where they would like to save the document.*

Click "Update" in the right-hand side of your screen to save changes.



Navigate back to your Dashboard by clicking on the program name in the top left-hand corner of your screen.



The top row of your Dashboard should now populate with specified program details.

Update Resume Settings

Resume Settings can be modified at any time by navigating to the WordPress backend and clicking on "Resume Settings." Revise any necessary information in the form fields provided and click "Update" on the right-hand side of your screen to save changes. Changes should be published immediately on the Dashboard by refreshing your browser.

Modify Dashboard Information

With Resume version 2.0.0, you have the option to turn on or off rows of data that appear on the Dashboard. To do this, navigate to the WordPress backend. Click "Resume Settings" in the left-hand navigation menu and choose sub-menu item, Dashboard. Toggle the On/Off switches here to turn on and off Agenda data, People data and Locations & Program Brief data. People data now provides the option to choose to view Attendee Registration data by Type or by Status. Click "Update" to save your changes.

The screenshot shows the 'Resume Dashboard' interface. On the left is a dark sidebar with a navigation menu containing: 'Program Briefs', 'Attendees', 'Contacts', 'Agenda', 'Resume Settings' (highlighted with a blue bar), 'Event Info', 'Dashboard', 'Event API', 'Users', 'Envato Market', and 'Collapse menu'. The main content area is titled 'Dashboard' and features a white notification box at the top stating: 'Sorry, but you do not have the correct permissions to install the [Classic Editor](#), [Contact Form 7](#) and [Woocommerce](#) plugins. Please contact the administrator of this site for help. [Dismiss this notice](#)'. Below the notification is the 'Resume Settings : Dashboard Config' section, which includes three toggleable settings: 1. 'Agenda' with a 'Yes' button and the text 'Display Agenda Panel on dashboard?'. 2. 'People' with a 'Show People Row' section containing a 'Yes' button and the text 'Display People Panel on dashboard?'. Below this is a 'People Row Options' section with two radio buttons: 'Contacts + Attendee Registration Type Count' (selected) and 'Contacts + Attendee Registration Status Count'. 3. 'Locations & Proram Briefs' with a 'Yes' button and the text 'Display Locations & Program Briefs Panel on dashboard?'.

USER ACCOUNTS

Resume version 2.0.0 gives the Administrator the ability to add multiple users with varying capabilities depending on the user type selected.

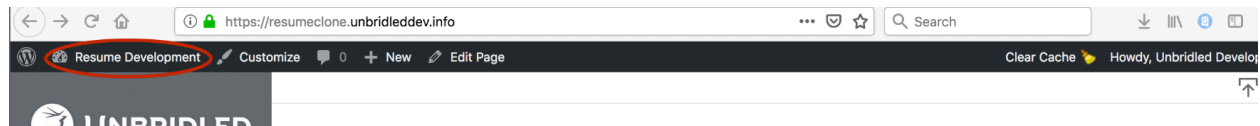
User Role Permissions

When creating a new user, user type should be chosen based on capabilities required of their role. Permissions for user types are as follows:

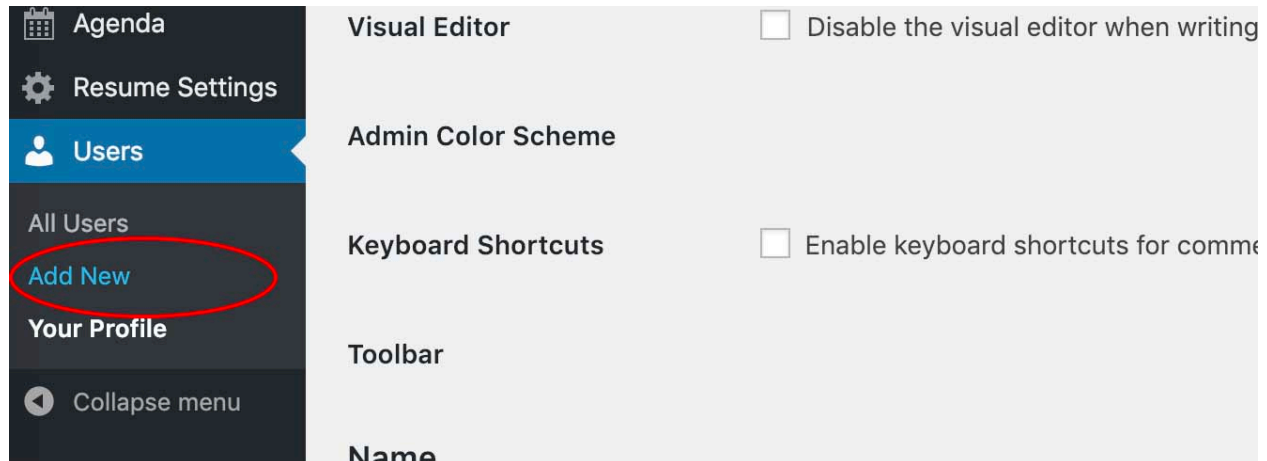
- XM Admin
 - Username: xadmin
 - Capabilities:
 - Full frontend access
 - Backend access to create, edit, and delete users
 - Backend and frontend access to create, edit, and delete Resume content (Contacts, Attendees, Agenda, Program Briefs, Locations)
- Project Manager
 - Username: project_manager
 - Capabilities:
 - Full frontend access
 - Backend and frontend access to create, edit, and delete Resume content (Contacts, Attendees, Agenda, Program Briefs, Locations)
- Planner
 - Username: planner
 - Capabilities:
 - No backend access
 - Full frontend access with the exception of the "Import" functionality
- Client
 - Username: client
 - Capabilities:
 - No backend access
 - Full frontend access with the exception of the "Import" functionality
 - Selected Program Briefs may be hidden from view

Adding New Users

To add new users, navigate to the WordPress backend.

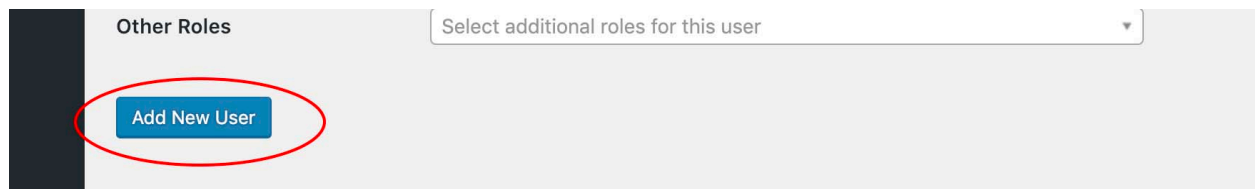


Click "Add New" located under "Users" in the menu on the left-hand side of the screen.



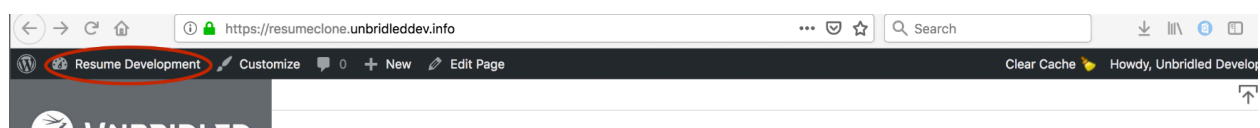
Fill out the form provided and select "Role" based on required permissions for the specified user. If the "Send User Notification" checkbox is selected, the user will receive an email to login. If this box is not selected, an email must be sent to this user notifying them with specific login instructions.

Click "Add New User" to save changes.

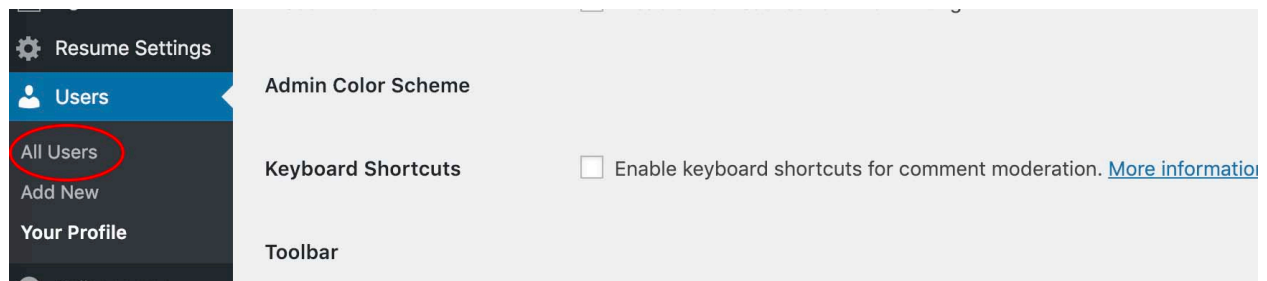


Delete Users

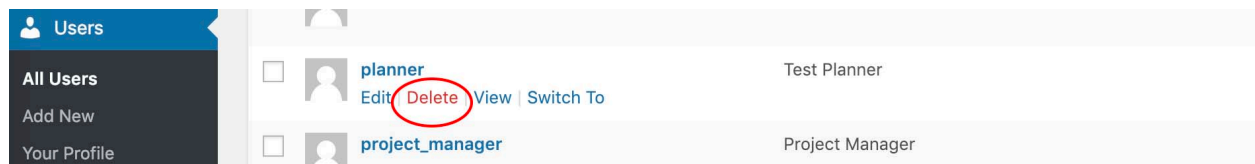
To delete a user, navigate to the WordPress backend.



Click "All Users" located under "Users" in the menu on the left-hand side of the screen.



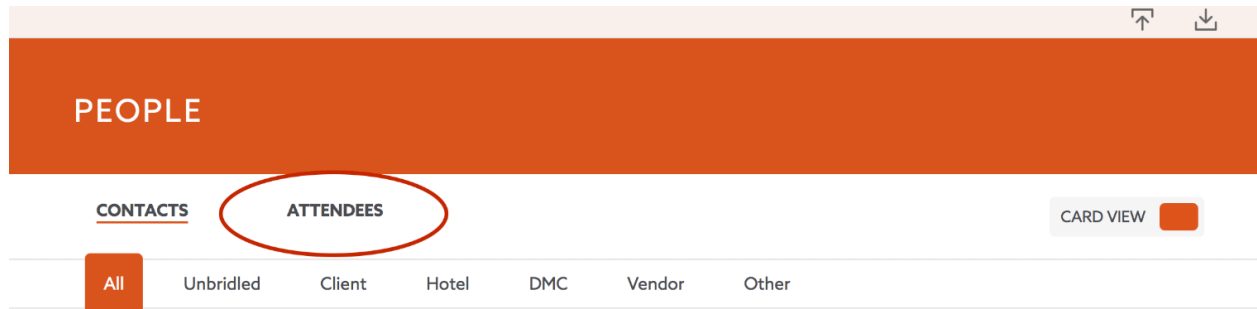
Hover over the user to be deleted and a menu of quick edit items will appear. Select "Delete."



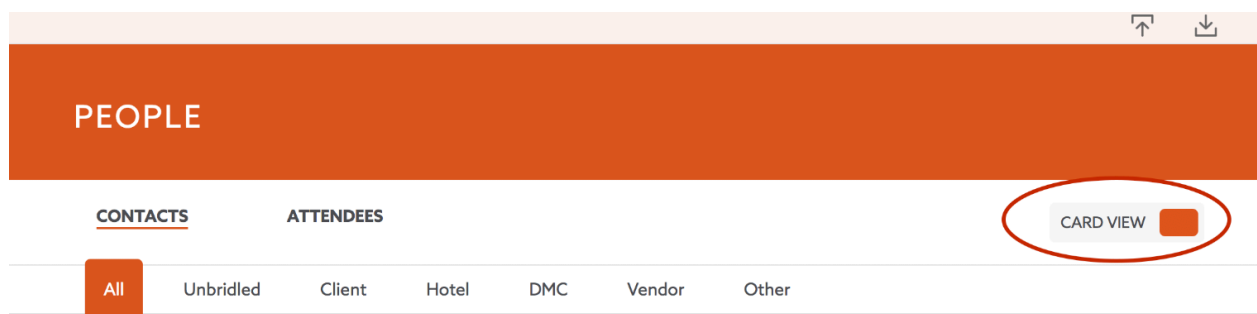
On the next screen, select "Confirm Deletion."

PEOPLE

People information is segregated into two categories – Contacts and Attendees. These categories do not overlap, and one individual could potentially be included in both categories. When you click on “People” in the left-hand navigation menu, your view will default to view Contacts. If you wish to view Attendees, that selection can be made from the navigation menu at the top of the page.



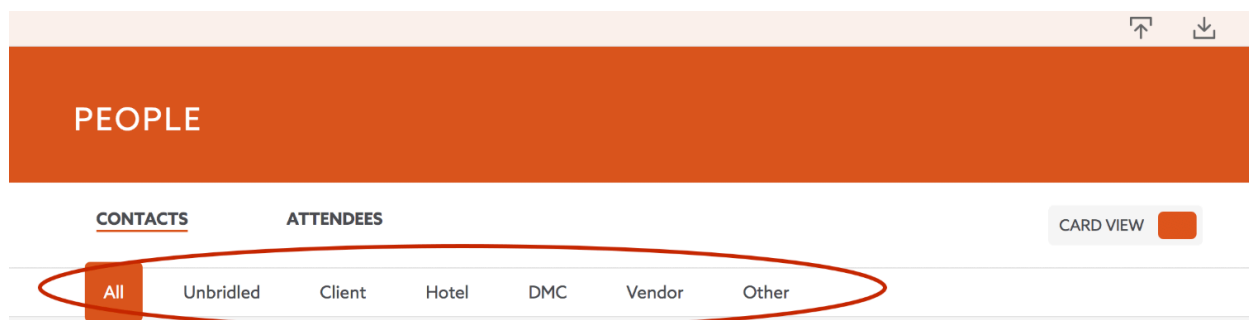
Both Contacts and Attendees have two views available – card view (default) and list view. The card view contains a set of business-like cards, one for each person, displaying that person’s relevant at-a-glance data (this will also include a Contact’s headshot, if provided). The list view also displays relevant at-a-glance data for each person but in a condensed form to more easily view numerous People at one time. The user can switch between card view and list view at any time by using the toggle in the page menu.



Contacts

Contacts are sorted into subcategories by Type. For example, ‘Unbridled’ contacts are one type, ‘Hotel,’ ‘Vendor,’ etc., are examples of others. There are in total 5 Contact Types along with an ‘Other’ option for those that don’t fall into the stated subcategories. By clicking on the subcategories listed in the sub-menu, the Contacts will filter based on Type chosen. This filter feature will make it easy to

quickly identify and locate all Contacts of a specific Type such as all 'Client' Contacts.



Add or Import Contacts

Some contacts come pre-loaded in your resume and you simply need to turn them on in the backend to make them visible on the frontend. To add additional contacts, you can either 1) import a spreadsheet of contacts from the Resume Import page (recommended), or 2) manually enter each contact into the WordPress backend.

Turn On Pre-loaded Contacts

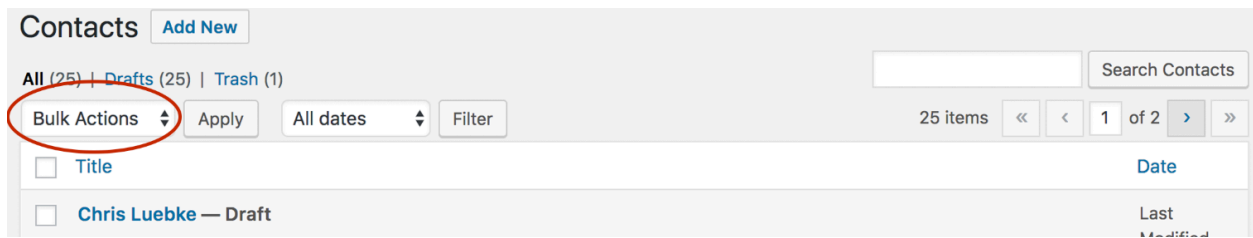
Navigate to the backend of the Resume, and click "Contacts" in the left nav.



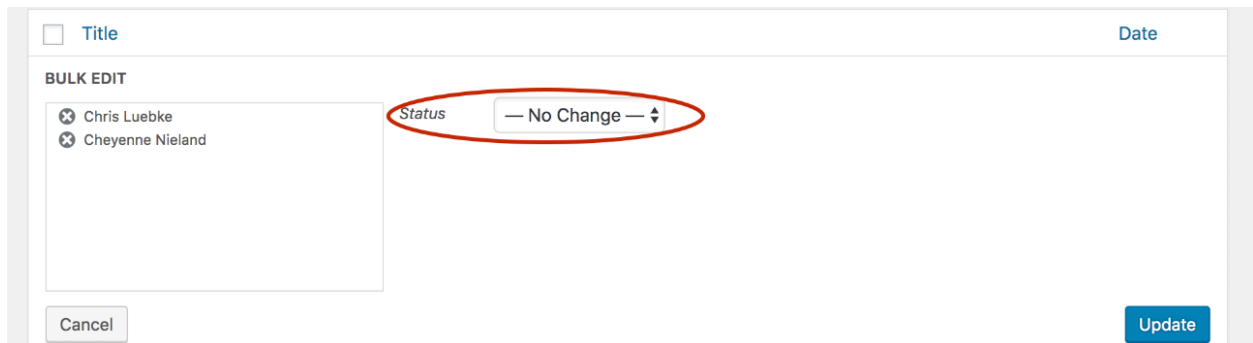
You will see a list of your pre-loaded contacts pull up. *Note: you may need to scroll through multiple pages to view them all.*



Check the checkboxes next to each contact that you'd like to "turn on" for this resume. Then, from the dropdown menu at the top, select "Edit" and click "Apply."



In the section that appears, change the Status setting to "Published" and click the blue "Update" button.



The contacts you selected should now appear on the frontend of your site.

Import Contacts (recommended)

If there are additional Contacts to be added, it is recommended to use the Resume Import functionality to upload contact data.

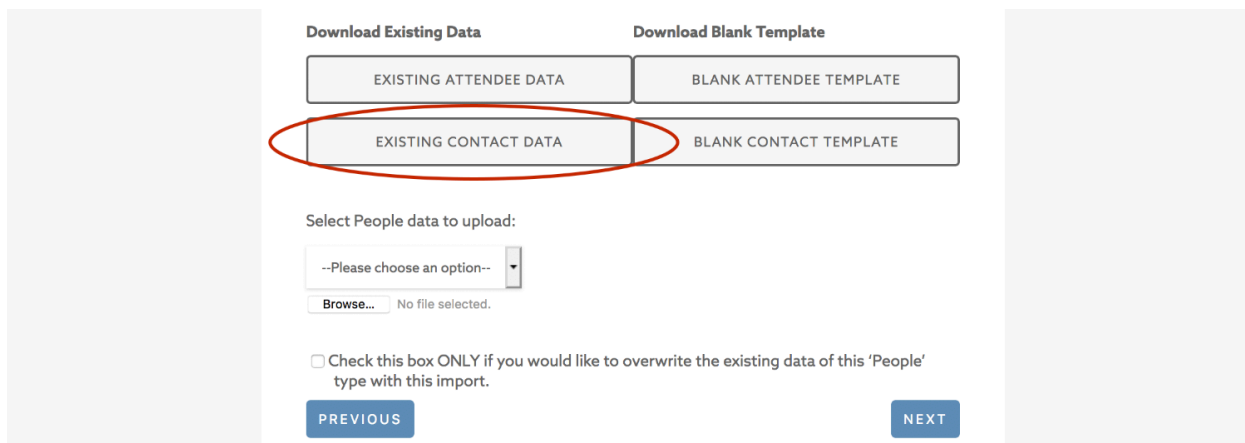
Click on the Import icon (arrow pointing up) in the upper-right hand corner of your screen.



Click "People."

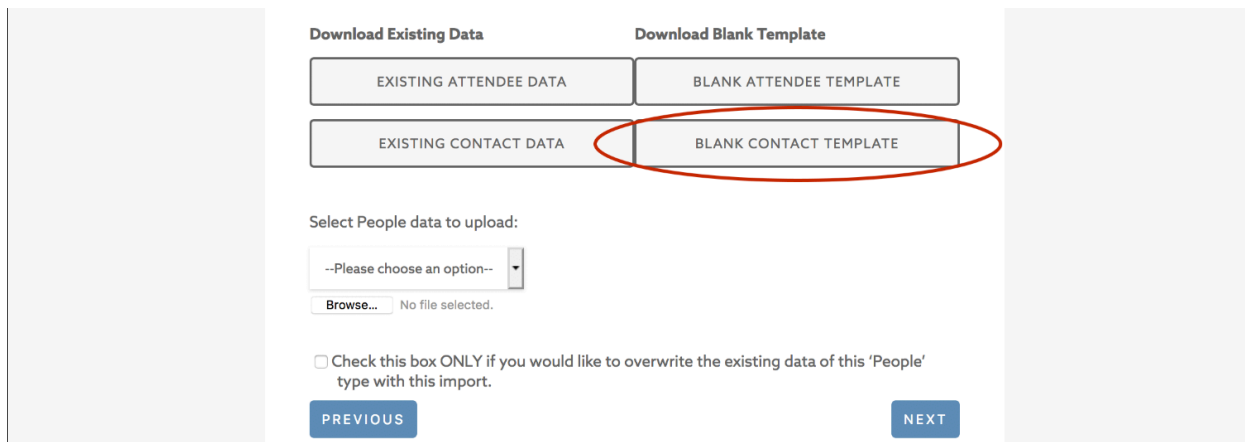
Here you can import both Contact and Attendee data, however, they must be done separately. *To import Contact data, be sure to first read the import instructions provided to you on the screen as these could have been updated more recently than this documentation.*

If you turned on pre-loaded contacts in the site in the previous step, you can download a Contacts grid with existing data here:



The screenshot shows a web interface with two columns: 'Download Existing Data' and 'Download Blank Template'. Under 'Download Existing Data', there are two buttons: 'EXISTING ATTENDEE DATA' and 'EXISTING CONTACT DATA'. The 'EXISTING CONTACT DATA' button is circled in red. Under 'Download Blank Template', there are two buttons: 'BLANK ATTENDEE TEMPLATE' and 'BLANK CONTACT TEMPLATE'. Below these buttons, there is a section titled 'Select People data to upload:' with a dropdown menu showing '--Please choose an option--', a 'Browse...' button, and a checkbox labeled 'Check this box ONLY if you would like to overwrite the existing data of this 'People' type with this import.' At the bottom, there are 'PREVIOUS' and 'NEXT' buttons.

Otherwise, if you are not using any pre-loaded contacts, you can download a blank contact template here:



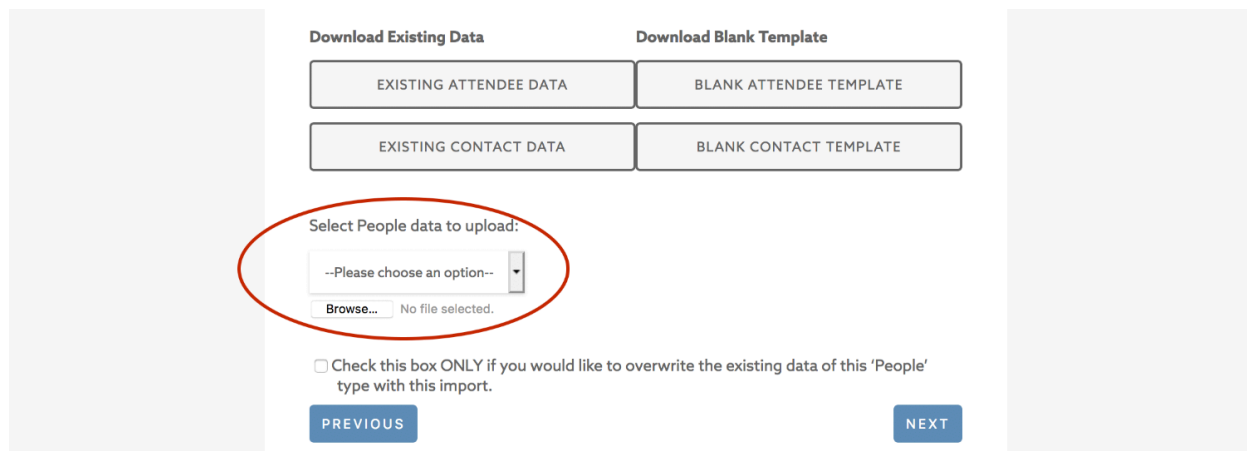
The screenshot shows the same web interface as above. In this case, the 'BLANK CONTACT TEMPLATE' button under the 'Download Blank Template' column is circled in red. All other elements, including the 'EXISTING CONTACT DATA' button, the 'Select People data to upload:' section, and the 'PREVIOUS'/'NEXT' buttons, are identical to the previous screenshot.

Fill in the downloaded contacts grid (using the dropdown to select Contact Type) by adding additional rows for each new Contact.

The Contact ID column is imperative for a successful import and you have a few options when it comes to filling out this field. You can:

- Create a new contact with a system-generated ID by leaving the ID cell blank.
OR
- Create a new contact with an ID of your choice (recommended) by putting your chosen ID in the cell (must be unique, contain only letters, numbers or underscores and be no more than 30 characters in length).

Verify the worksheet tab you would like to import in your spreadsheet is properly named according to the on-screen instructions and your Excel file has been saved as the proper filetype (.xls or .xlsx). Choose Contacts under the dropdown "Select People data to upload:" and locate the Excel file saved on your computer.



Important: by clicking the checkbox at the bottom of the screen, you will overwrite any existing data of that chosen datatype (in this instance, Contact data) upon import. All existing data and any associated data with those contacts (such as Notes) will be deleted. Any links created between the existing data (such as headshot images) will be broken and have to be re-linked. Click "Next" to proceed to Step Two.

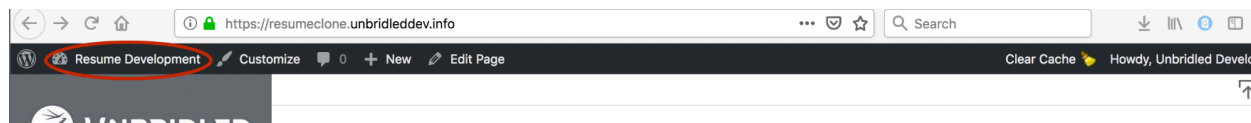
In Step Two, map the header fields of your import to the Resume Import Fields.

**Note: The Contact ID and Contact Type must be mapped. Click "Next" to proceed to Step Three.*

In Step Three, verify your choices to be mapped to the Resume on this screen before clicking "Submit." Once submitted, you should receive a message that tells you if your import was successful and whether or not any rows were skipped due to data inconsistencies. If rows were skipped, address the inconsistencies and re-import the data.

Add Headshots

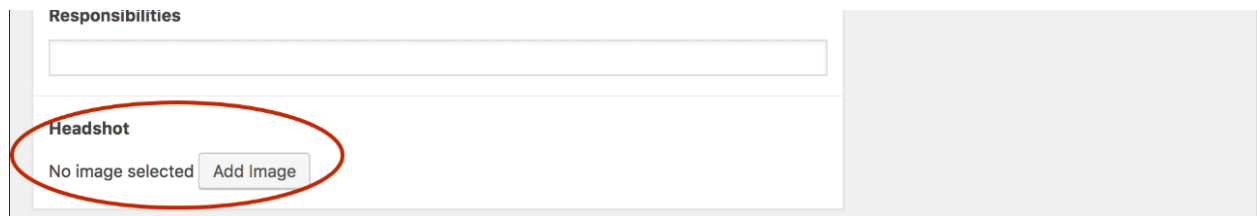
To add headshots for newly imported Contacts, you will need to manually edit each new contact in the WordPress backend. To do so, navigate to the backend.



Click "Contacts" in the left nav.



Click on the contact for whom you'd like to add a headshot. Scroll to the bottom of the form that comes up for this contact to find the Headshot field.

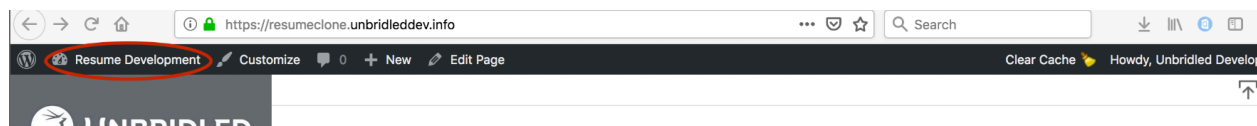


Upload headshot here – recommended file size is 400px X 400px.

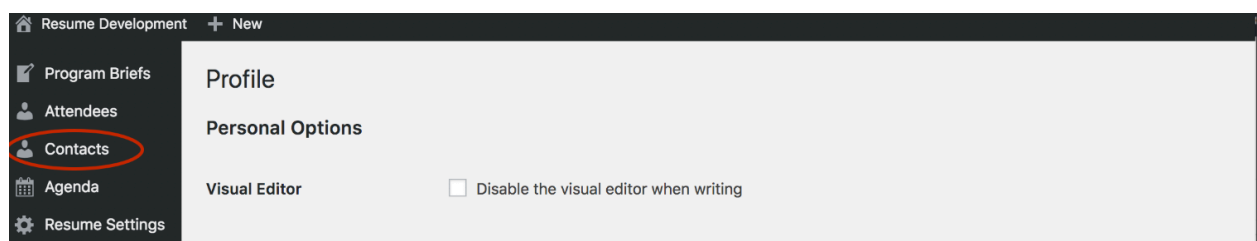
Be sure to click the blue "Update" button at the top of the screen to save.

Manually Add Contacts

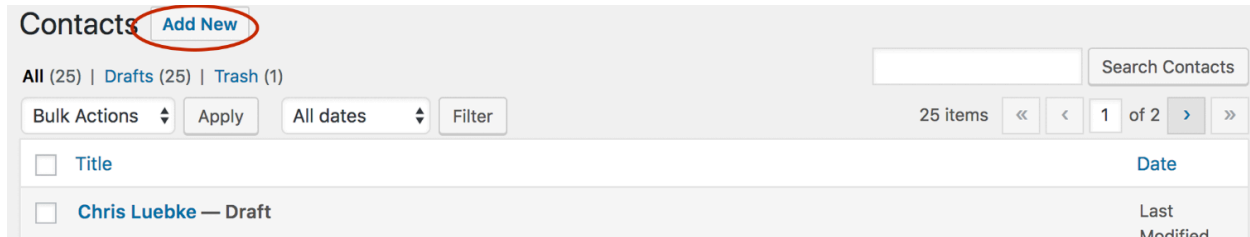
In order to manually add Contacts, navigate to the WordPress backend.



Click "Contacts" in the left nav.



Select "Add New" at the top of the page.



At the top of the page, where it says, 'Enter title here,' enter the contact's full name. From the dropdown under Contact Type, select the individual's contact type. If none of these categories suffice, please select Other. Fill out the remainder of the form. If no company names are provided under the Company field, select the radio button next to the blank field and write in Company Name. *The Company field will only contain choices once sufficient data has been loaded into the Resume.* Additionally, a headshot may be uploaded here; the recommended file size is a square, 400 pixels x 400 pixels.

Click the blue "Publish" button at the top of the screen to save your Contact. The new Contact should now have their own card (or row in list view) in the People Contacts view.

Update Contacts by Import

Contact data can be updated through the Resume Import feature. Click on the Import icon (arrow pointing up) in the upper-right hand corner of your screen (frontend).



Click "People."

Click the button to "Download Existing Contact Data." Edit the data as necessary but taking care to ensure Contact ID remains the same for each individual/row. New contacts can also be added to this list by repeating steps from above and ensuring the Contact ID field is left blank or filled in with a unique ID with each new row.

**Note: If the Contact ID for an existing contact changes upon import, a duplicate contact will be created with a new ID.*

Delete Contacts

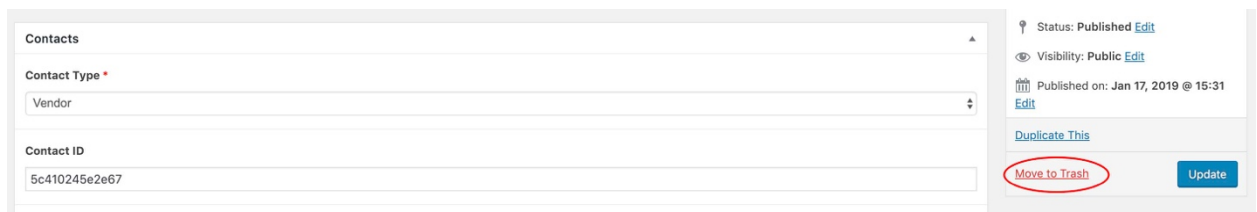
In order to delete a contact, navigate to the backend of WordPress. Deletions cannot occur on the frontend or via an import.



Click "Contacts" from the left-hand navigation.

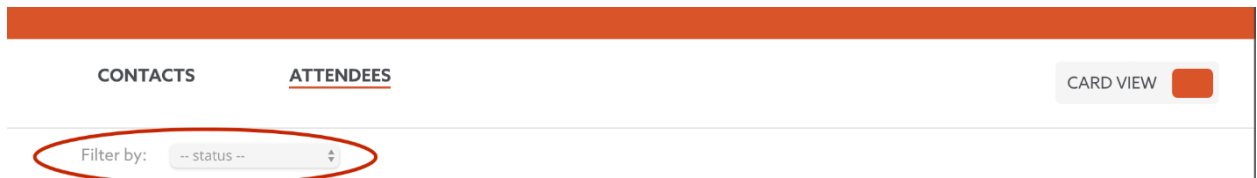


Select the contact's name from the list provided and, on their profile page, click "Move to Trash" on the right-hand side of your screen.



Attendees

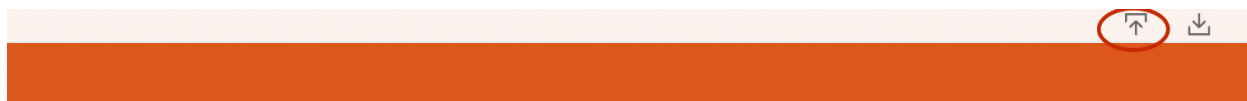
Attendees are sorted into subcategories by Invitee (Registration) Status. There are 5 registration status designations in total - 'Accepted,' 'Declined,' 'No Response,' 'Cancelled,' and 'Visited'. These designations are the same as Cvent Invitee Status designations. Attendees can be filtered from the dropdown located in the sub-menu of the People Attendees view. This filter feature will make it easy to quickly identify and locate all Attendees with a specific status designation such as 'Accepted'.



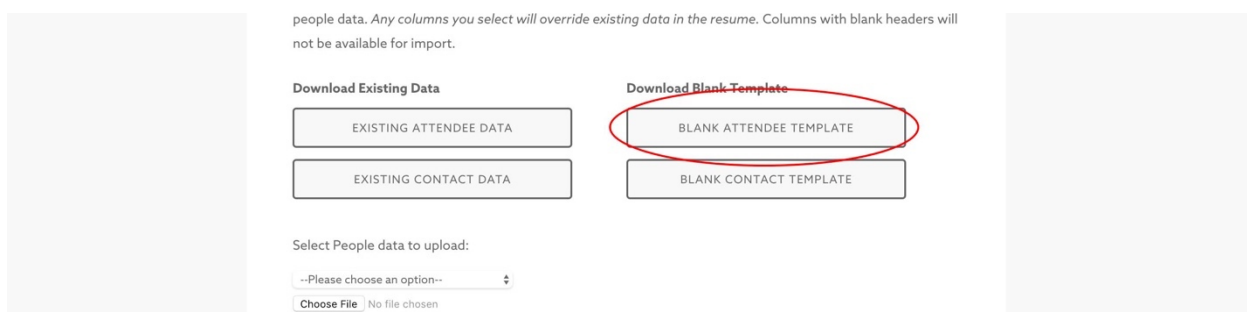
Import Attendees

Since there are typically too many attendees to manually add, it is highly recommended to add and update attendee data via the Resume Import feature.

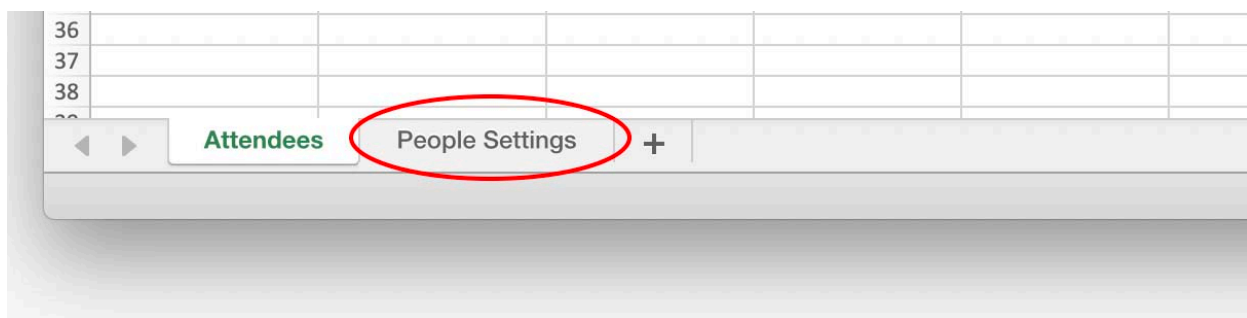
Click on the Import icon (arrow pointing up) in the upper-right hand corner of your screen and click "People."



To import Attendee data, be sure to first read import instructions provided to you on the screen as these could have been updated more recently than this documentation. If no Attendee data is currently loaded into the Resume (no manual entries and/or no previous imports), download a Blank Template for your use:



To begin, click on worksheet 'People Settings.'



Fill in the columns with Registration Type, Tracks, Status and Admission Type based on registration set-up in Cvent.

Once the spreadsheet settings are aligned with Cvent registration set-up, navigate back to worksheet 'Attendees.' If you have additional questions that were asked at the time of Registration that you would like included in Resume Attendee data, add each question to a blank column header field in the 'Attendees' worksheet.

Important: All Registration Questions must be present in the spreadsheet at the time of upload; the system treats this field as a collection and the entire collection will be overwritten each time it is chosen for mapping.



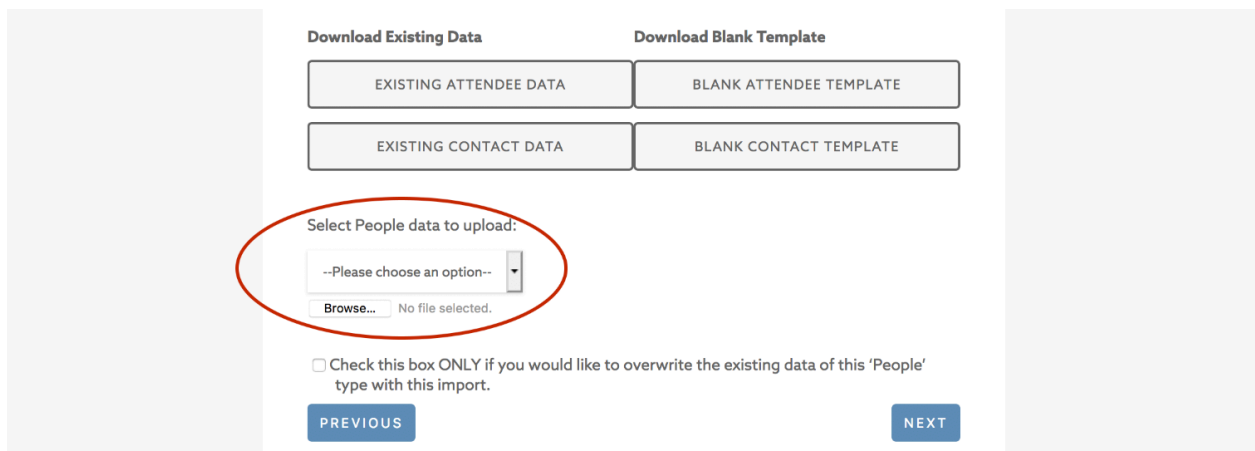
	C	D	E	F	G	H	I	J	K	L	M
	Last Name	Registration Type	Tracks	Status	Admission Type	Job Title	Phone	Email	Company	Reg Question 1 (optional)	
1											
2											
3											
4											
5											
6											
7											
8											

Fill in the blank template with Attendee data, using the dropdown to select Registration Type, Tracks, Status, and Admission Type.

The Attendee ID column is imperative for a successful import and you have a few options when it comes to filling out this field. You can:

- Create a new attendee with a system-generated ID by leaving the ID cell blank.
- OR
- Create a new attendee with an ID of your choice by putting your chosen ID in the cell (must be unique, contain only letters, numbers or underscores and be no more than 30 characters in length).

Verify the worksheet you would like to import in your spreadsheet is properly named according to the on-screen instructions and your Excel file has been saved as the proper filetype (.xls or .xlsx). Choose Attendees under the dropdown "Select People data to upload:" and locate the Excel file saved on your computer.



Download Existing Data
Download Blank Template

EXISTING ATTENDEE DATA
BLANK ATTENDEE TEMPLATE

EXISTING CONTACT DATA
BLANK CONTACT TEMPLATE

Select People data to upload:

--Please choose an option--

Browse... No file selected.

☐ Check this box ONLY if you would like to overwrite the existing data of this 'People' type with this import.

PREVIOUS
NEXT

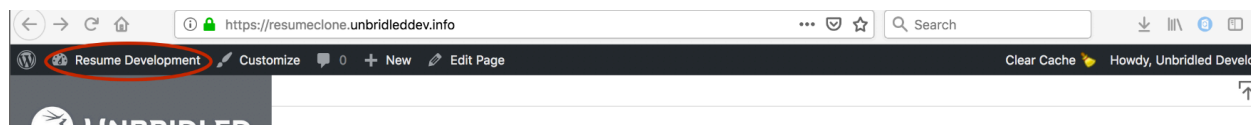
Important: by clicking the checkbox at the bottom of the screen, you will overwrite any existing data of that chosen datatype (in this instance, Attendee data) upon import. All existing data and any associated data with those attendees (such as Notes) will be deleted. Click "Next" to proceed to Step Two.

Similarly as you would in Cvent, map the header fields of your import to the Resume Import Fields. *The Attendee ID and Status must be mapped.* Click "Next" to proceed to Step Three.

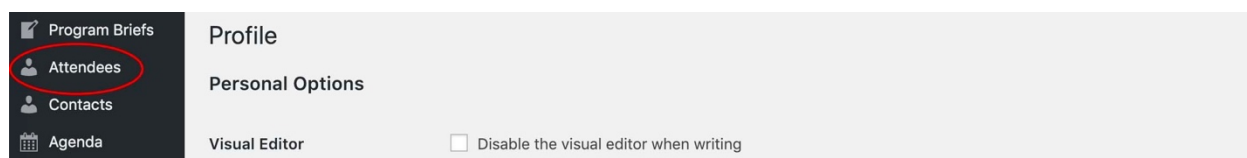
Verify your choices to be mapped to the Resume on this screen before clicking "Submit." Once submitted, you should receive a message that tells you if your import was successful and whether or not any rows were skipped due to data inconsistencies. If rows were skipped, address the inconsistencies and re-import the data.

Manually Add Attendees

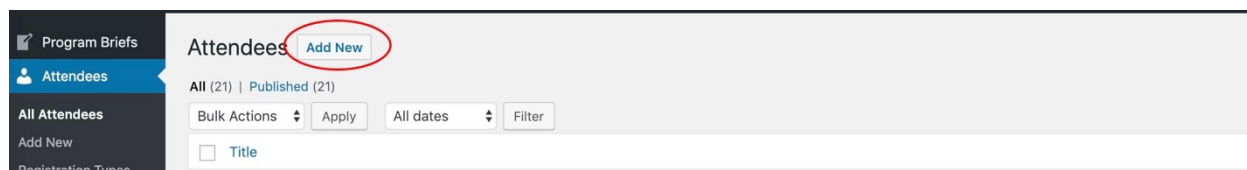
In order to manually add Attendees, navigate to the WordPress backend.



Click "Attendees" from the left-hand navigation.



Select "Add New" at the top of the page.



At the top of the page, where it says, 'Enter title here,' enter the attendee's full name. Fill out the remainder of the form.

If an import of Attendee data has already occurred, Registration Settings should have been established and would be available for selection on the right-hand side of your screen. These would be the choices (either as checkbox or radio buttons) available under Registration Types, Tracks, Status and Admission Types. Select the appropriate responses for each attendee.

**Note: one attendee can be assigned multiple Registration Types, Tracks and Admission Types. They can only have one Status.*

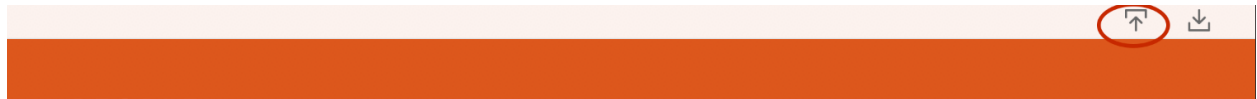
The screenshot displays a vertical stack of four settings panels on a light gray background. Each panel has a title bar with a small upward arrow. The first panel, 'Registration Types', has two tabs: 'All Registration Types' (selected) and 'Most Used'. It contains five unchecked checkboxes: Attendee, Client, Unbridled, Vendor, and VIP. Below the list is a blue link '+ Add new Registration Type'. The second panel, 'Tracks', also has 'All Tracks' and 'Most Used' tabs. It contains three unchecked checkboxes: Colorado, Florida, and Texas, followed by a blue link '+ Add New Track'. The third panel, 'Status', has 'All Status' and 'Most Used' tabs. It contains five unselected radio buttons: Accepted, Cancelled, Declined, No Response, and Visited, followed by a blue link '+ Add new Status'. The fourth panel, 'Admission Types', is partially visible at the bottom.

If Registration Settings have not been established through an import, Registration Type, Track, Status and Admission Types can be created here by clicking the "+ Add New ---" button located under each category.

Click the blue "Publish" button at the top of the screen to save your work. The new attendee should now have their own card (or row in list view) in the People Attendees view.

Update Attendees by Import

Attendee data can be updated through the Resume Import feature. Click on the Import icon (arrow pointing up) in the upper-right hand corner of your screen (frontend).



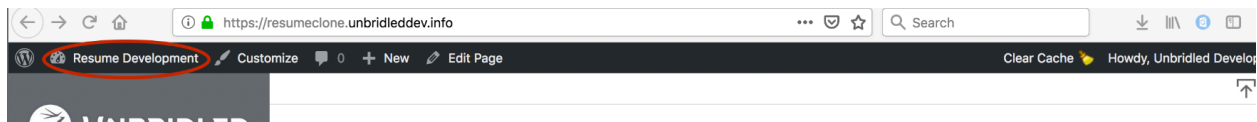
Click "People."

Click the button to "Download Existing Attendee Data." Edit the data as necessary but taking care to ensure Attendee ID remains the same for each individual/row. New attendees can also be added to this list by repeating steps from above and ensuring the Attendee ID field is left blank or filled in with a unique ID with each new row.

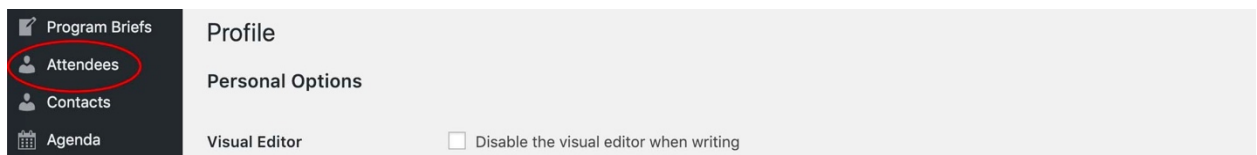
**Note: If the Attendee ID for an existing attendee changes upon import, a duplicate attendee will be created with a new ID.*

Delete Attendees

In order to delete an attendee, navigate to the backend of WordPress. Deletions cannot occur on the frontend or via an import.



Click "Attendees" from the left-hand navigation.



Select the attendee's name from the list provided and, on their profile page, click "Move to Trash" on the right-hand side of your screen.

Attendees		📌 Status: Published Edit
Attendee ID		👁 Visibility: Public Edit
<input type="text" value="5c3f97cf137f0"/>		📅 Published on: Jan 16, 2019 @ 13:45 Edit
First Name		Duplicate This
<input type="text" value="Wendy"/>		Move to Trash Update

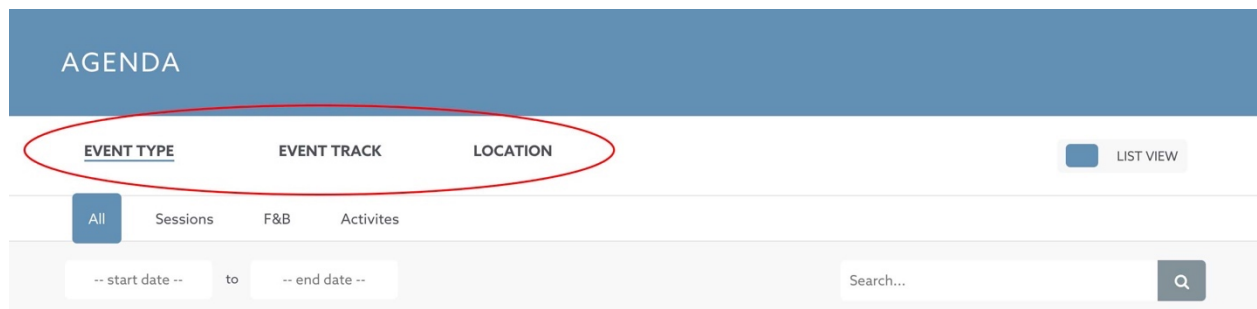
AGENDA

The Agenda data is categorized into one of three categories – Session, Food & Beverage (F&B), and Activity.

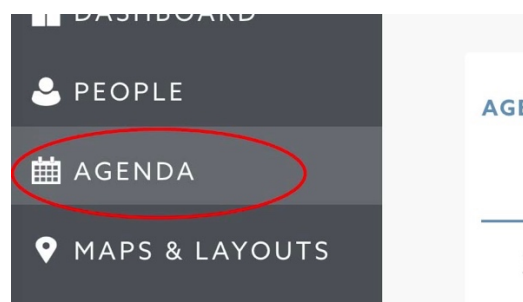
Similarly to People, Agenda data is available in two different views – card view and list view. The card view contains a set of business-like cards, one card for each piece of Agenda data, displaying pertinent at-a-glance information. The tab on the top of the card displays the Agenda event's category (Session, Food & Beverage, or Activity) and provides the Resume user with a visual aid in sorting and filtering. The list view also displays pertinent at-a-glance information for each Agenda event but in a condensed form to more easily view numerous events at one time. The user can switch between card view and list view at any time by using the toggle in the page menu.

Agenda Events

Agenda events are primarily filtered in one of three ways; by event type (Session, F&B or Activity), by Event Track, or by Location. This selection can be made from the Agenda navigation menu at the top of the screen.



When choosing Agenda from the main Resume navigation on the left-hand side of your screen, the default will display a list of all events.



Since the view defaults to filter by Event Type, the user can select Session, F&B, or Activity in the sub-menu to view only events of a certain type. When filtering by Event Track and Location, the user can utilize the dropdown filters in the sub-menu to narrow down their selection.

EVENT TYPE LOCATION EVENT TRACK LIST VIEW

Filter by: -- select venue -- -- select meeting space --

-- start date -- to -- end date -- Search...

Regardless of how a user chooses to filter agenda items, they can narrow down their search parameters even more by selecting only events that occur in a specified date range. This selection can be made just under the sub-menu by choosing a date range from the date picker.

-- start date -- to -- end date --

Jan 2019

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Today Close

Lastly, if the user knows more specifically what they are looking for, they can use the search function to filter for keywords.

Filter by: -- select venue --

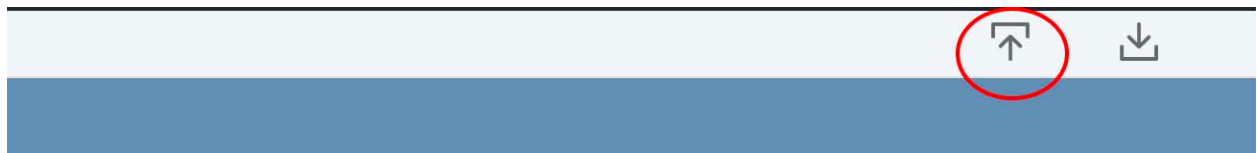
-- start date -- to -- end date -- Search...

Import Agenda Events (recommended)

Important: Agenda events cannot be mapped to specific locations unless these locations are uploaded into the Resume *BEFORE* the agenda import. See page 39 for how to import Locations before following the steps below.

Since there are typically too many agenda items to add manually, it is highly recommended to add and update agenda data via the Resume Import functionality.

Click on the Import icon (arrow pointing up) in the upper-right hand corner of your screen.



Click "Agenda."

**Note: be sure to first read import instructions provided on this screen as these could have been updated more recently than this documentation.*

Important: since the different types (Session, F&B, and Activity) of agenda events vary greatly in what data correlates to each, the three types must be imported separately. For instance, all Sessions may be imported together, all F&B events may be imported together, and all Activities may be imported together, however, Sessions and F&B information cannot be compiled and added at the same time from the same spreadsheet.

If no agenda data is currently loaded into the Resume (no manual entries and/or no previous imports), download a Blank Template of the correct data type for your use here:

Download Data

EXISTING SESSION DATA

EXISTING F&B DATA

EXISTING ACTIVITIES DATA

EXISTING LOCATION DATA

Download Blank Template

BLANK SESSION GRID

BLANK F&B GRID

BLANK ACTIVITIES GRID

BLANK LOCATION GRID

Select Agenda data to upload:

--Please choose an option--

Choose File No file chosen

**Note: the location grids are available for your download and use from this screen however, they cannot be uploaded here. You must navigate back to the Import screen and select Maps & Layouts.*

Otherwise, if agenda data already exists in the Resume, download a grid of existing data here:

Download Data

EXISTING SESSION DATA

EXISTING F&B DATA

EXISTING ACTIVITIES DATA

EXISTING LOCATION DATA

Download Blank Template

BLANK SESSION GRID

BLANK F&B GRID

BLANK ACTIVITIES GRID

BLANK LOCATION GRID

Select Agenda data to upload:

--Please choose an option--

Choose File No file chosen

If importing Session or F&B data, click on worksheet "Session Settings" or "F&B Type" respectively.

27

Sessions Grid

Session Settings

+

For Sessions, fill in entries for Session Type (e.g. Breakout, Pop-Up, General Session) and Tracks based on Registration set-up in Cvent.

	A	B	C	D
1	Session Type	Track		
2	Breakout			
3	Pop-Up			
4	General Session			
5				
6				

For F&B, fill in the columns according to F&B Types occurring during this program (e.g. Breakfast, Lunch, Evening Event).

	A	B	C	D	E
1	F&B Type				
2	Break				
3	Breakfast				
4	Lunch				
5	Evening Event				
6					
7					

This step can be skipped if importing Activities.

Once spreadsheet settings are completed, navigate back to worksheet '[Data Type] Grid.'



Fill in the blank template with applicable data creating a new row for each agenda event and using the column dropdowns where available. No dropdowns are associated for Activity data.

The ID column is imperative for a successful import and you have a few options when it comes to filling out this field. You can:

- Create a new entry with a system-generated ID by leaving the ID cell blank.
OR
- Create a new entry with an ID of your choice by putting your chosen ID in the cell (must be unique, contain only letters, numbers or underscores and be no more than 30 characters in length).

Verify the worksheet you would like to import in your spreadsheet is properly named according to the on-screen instructions and your Excel file has been saved as the proper filetype (.xls or .xlsx). Choose applicable data type under the dropdown "Select Agenda data to upload:" and locate the Excel file saved on your computer.

Important: by clicking the checkbox at the bottom of the screen, you will overwrite any existing data of that chosen datatype upon import. All existing data and any associated data with those entries (such as Notes) will be deleted. Any links created between the existing data (such as Images) will be broken and have to be re-linked. Click "Next" to proceed to Step Two.

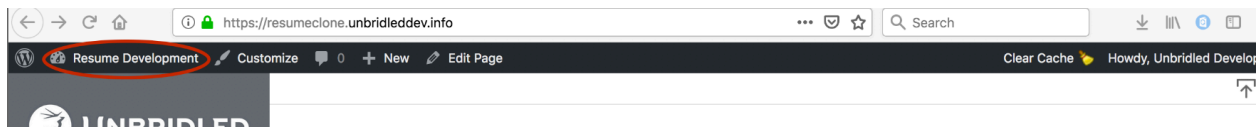
In Step Two, map the header fields of your import to the Resume Import Fields.

**Note: The ID must be mapped. Click "Next" to proceed to Step Three.*

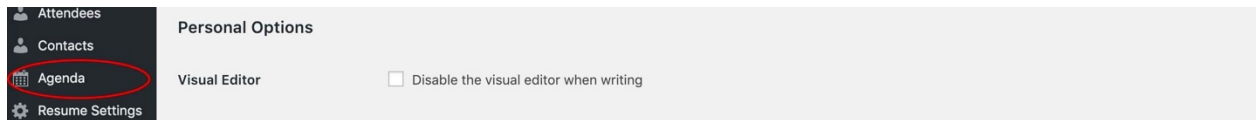
In Step Three, verify your choices to be mapped to the Resume on this screen before clicking "Submit." Once submitted, you should receive a message that tells you if your import was successful and whether or not any rows were skipped due to data inconsistencies. If rows were skipped, address the inconsistencies and re-import the data.

Add Room Drawing to Agenda Events

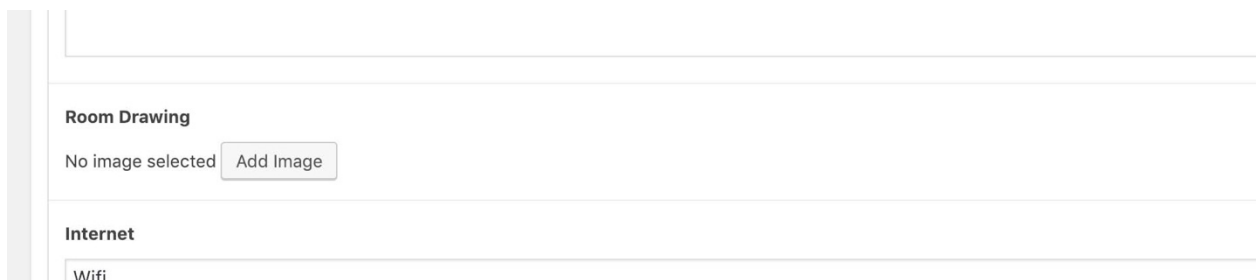
To add room drawing images for newly imported Agenda events, you will need to manually edit each new event in the WordPress backend. To do so, navigate to the backend.



Click "Agenda" in the left nav.



Click on the agenda event where you'd like to add the image. Scroll down to Room Drawing and click "Add Image."

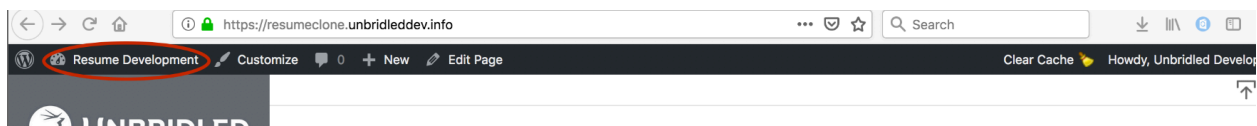


Choose the file from your computer and upload the image here. Supported filetypes include JPG, PNG, PDF, Word Doc and Excel files. Maximum allowable file size is 128MB.

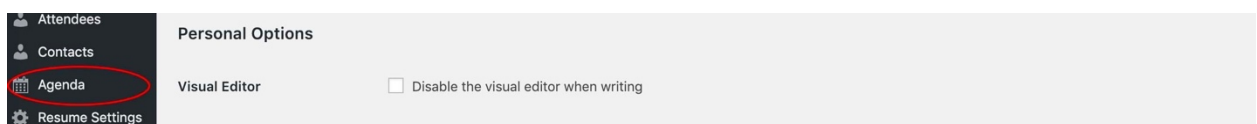
Be sure to click the blue "Update" button at the top of the screen to save.

Manually Add Agenda Events

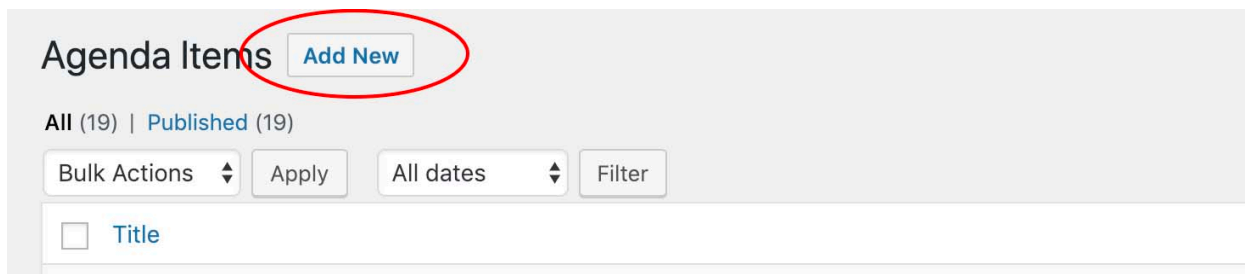
In order to manually add a new agenda event, navigate to the WordPress backend.



Click "Agenda" in the left nav.



Select "Add New" at the top of the page.

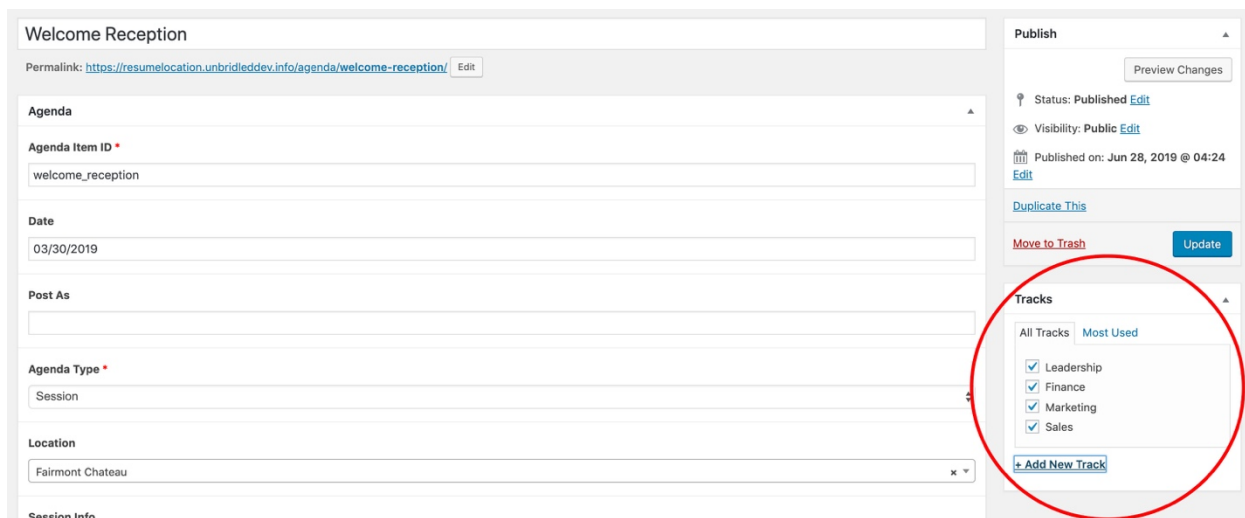


The screenshot shows the top of a web application interface. On the left, the text "Agenda Items" is displayed. To its right is a button labeled "Add New", which is circled in red. Below this, there is a filter section with "All (19)" and "Published (19)" links. Further down are buttons for "Bulk Actions", "Apply", "All dates", and "Filter". At the bottom of this section is a checkbox labeled "Title".

At the top of the page, where it says, 'Enter title here,' enter the name of the event. Fill out the remainder of the form using the dropdown to select Agenda Type and Location.

If an import of Agenda data has already occurred, Tracks may have previously been established and, if so, would be available for selection on the right-hand side of your screen. Select the associated Tracks for each agenda event.

**Note: one event can be assigned multiple Tracks.*



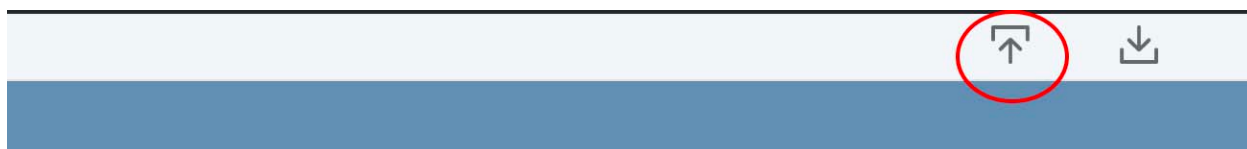
The screenshot shows a form for editing an agenda item titled "Welcome Reception". The form includes fields for "Agenda Item ID" (with value "welcome_reception"), "Date" (with value "03/30/2019"), "Post As", "Agenda Type" (with value "Session"), and "Location" (with value "Fairmont Chateau"). On the right side, there is a "Publish" section with "Status: Published", "Visibility: Public", and "Published on: Jun 28, 2019 @ 04:24". Below this is a "Tracks" section, which is circled in red. It contains a list of tracks: "Leadership", "Finance", "Marketing", and "Sales", each with a checked checkbox. At the bottom of the Tracks section is a link that says "+ Add New Track".

If Tracks have not been previously established, they can be manually created by clicking the "+ Add New Track" link located underneath the menu on the right hand side of your screen.

Click the blue "Publish" button at the top of the screen to save your work. The new agenda event should now have its own card (or row in list view) in the Agenda view.

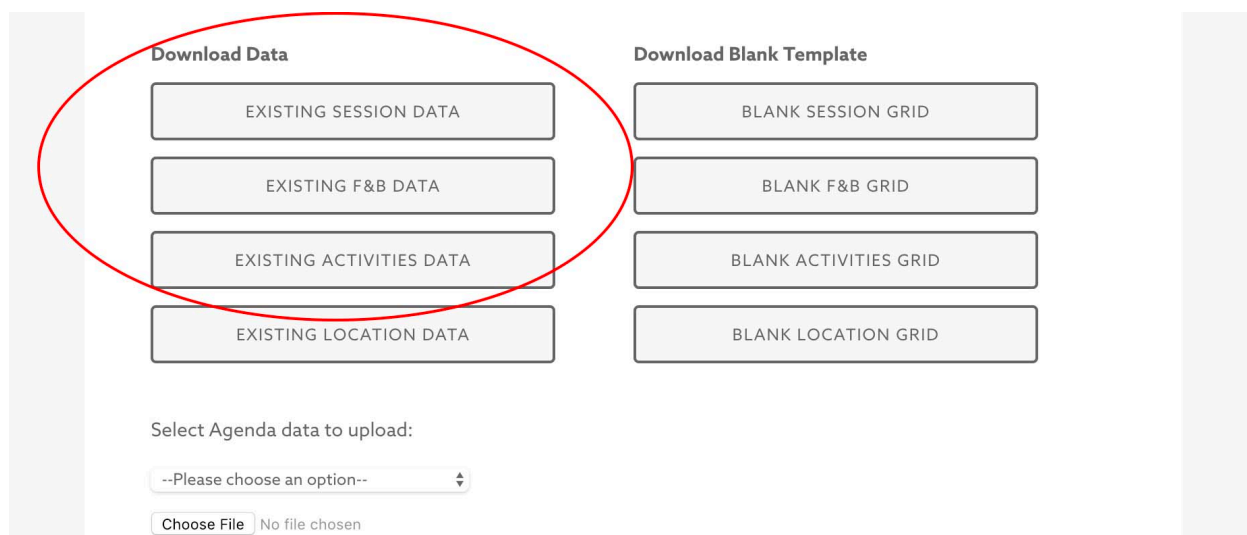
Update Agenda Events

Agenda events can be updated through the Resume Import functionality. Click on the Import icon (arrow pointing up) in the upper-right hand corner of your screen (frontend).



Click "Agenda."

Click the button to download "Existing [Type] Data."

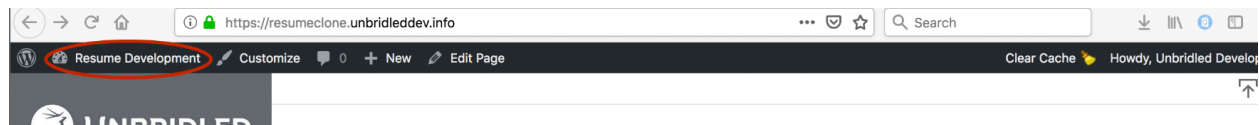


Edit the data as necessary but taking care to ensure ID remains the same for each row. New entries can also be added to this list by repeating steps from above and ensuring the ID field is left blank or filled in with a unique ID with each new row.

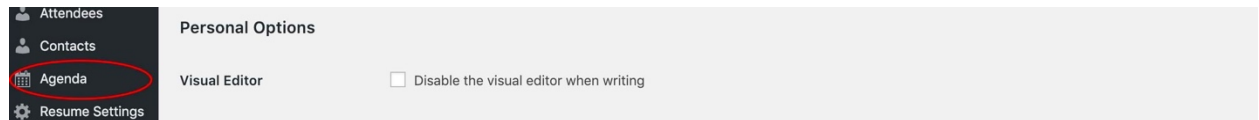
**Note: If the ID for an existing agenda event changes upon import, a duplicate entry will be created with a new ID.*

Delete Agenda Events

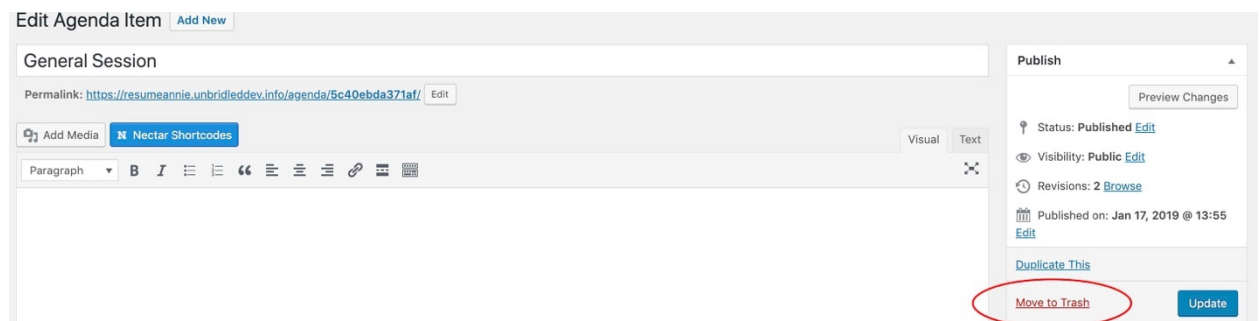
In order to delete an agenda event, navigate to the backend of WordPress. Deletions cannot occur on the frontend or via an import.



Click "Agenda" from the left-hand navigation.



Select the agenda event name from the list provided and click "Move to Trash" on the right-hand side of your screen.



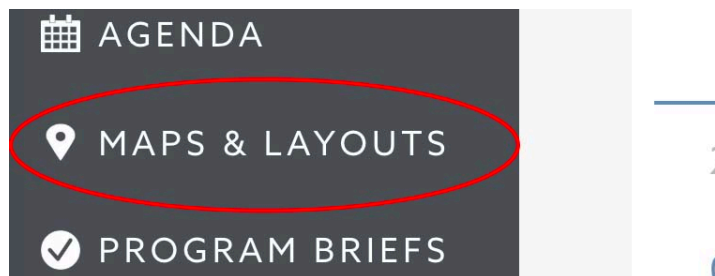
MAPS & LAYOUTS

Organizational Structure

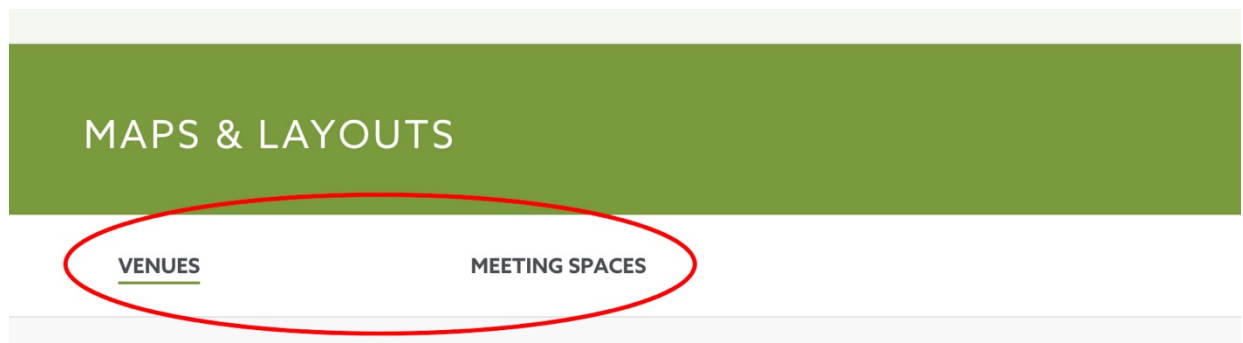
With the release of Resume 2.0.0, Location data can now be imported and manually added similarly to People and Agenda data. Locations are categorized as either a Venue or a Meeting Space and can be linked to an Agenda item either by associating the Location ID during an import or picking from a dropdown field under the Agenda item in the WordPress backend.

Viewing and Filtering Locations

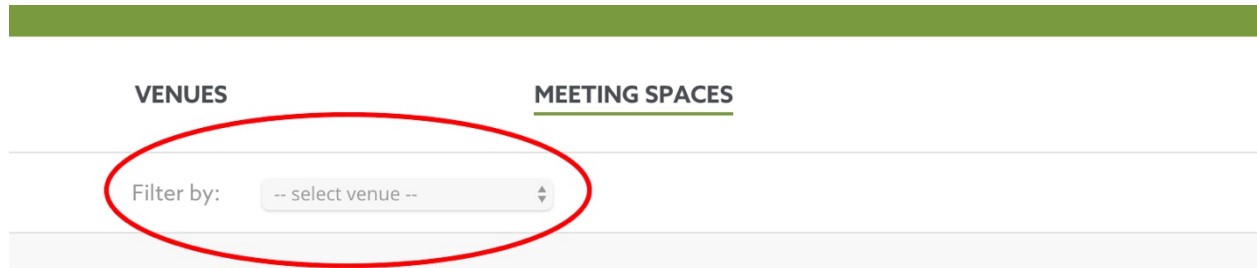
When clicking on “Maps & Layouts” from the left-hand navigation menu, the page view defaults to a list of Venues.



From the top page menu, the user can switch views between a list of Venues or Meeting Spaces.



In Meeting Spaces view, the user can filter by Venue using the dropdown located in the sub-menu.

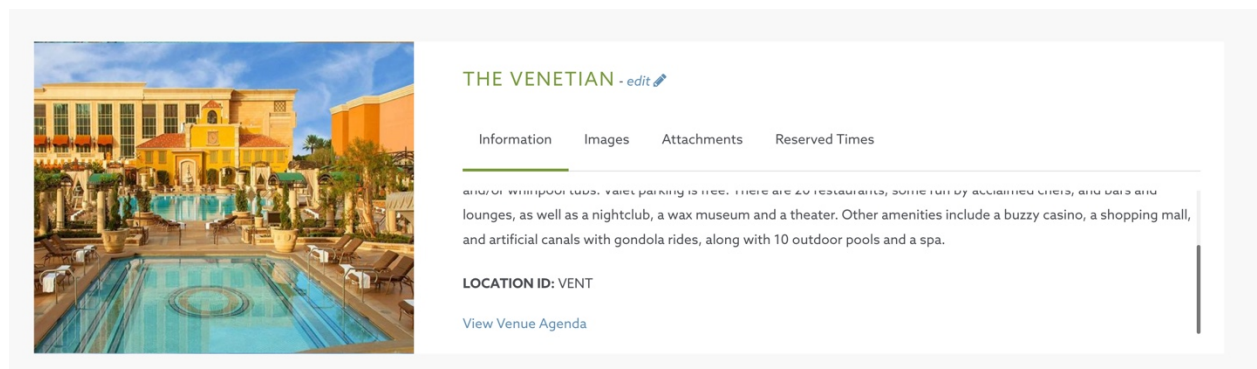


The user can also use the search bar located below the sub-menu, in any view, to type in keywords to locate the desired location information.

Location Information

Each location on the frontend of the Resume may display up to four tabs of information to the user: Information, Images, Attachments, and Reserved Times.

- The Information tab contains general information about the space such as a venue description, room size dimensions, max capacity, etc. The Information tab also displays the Location ID which is the unique identifier for that location and is either automatically generated upon import or chosen by the user at the time of entry creation.



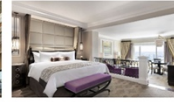
- The Images tab is a gallery of images of that location.

**Note: Venues will display an image to the left of their list entry if an image is available. A green color block will appear if no images have been uploaded. By default, the Resume will use the first image uploaded for display here. To update this primary image, add the image of choice to the backend editor then re-order the image uploads to make the desired image first in the list.*



THE VENETIAN - edit

Information Images Attachments Reserved Times



- The Attachments tab is a list of attachments pertaining to that space such as a floor plan. These files can be in PDF, Excel, or Word format. When selected, PDFs will open automatically in a new browser window. Excel or Word files by default will download to the user's device.

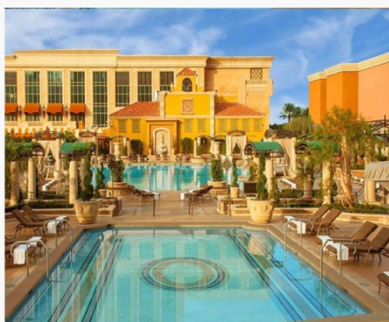


THE VENETIAN - edit

Information Images Attachments Reserved Times

Room Layout

- The Reserved Times tab is a list of times specified by the user or admin that typically have been contracted for use for this Program. Dates and time will display here in a list format.



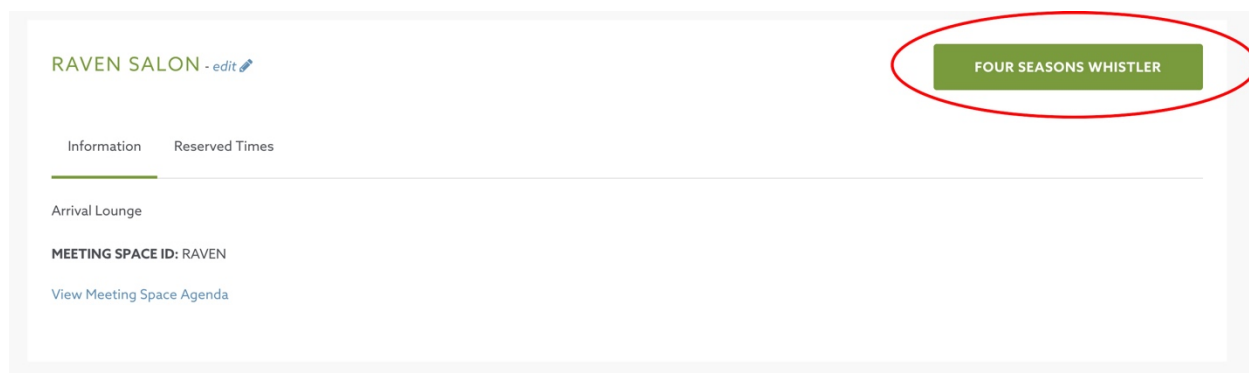
THE VENETIAN - edit

Information Images Attachments Reserved Times

- Tuesday, June 25, 2019 | 8:00 AM - 12:00 AM
- Wednesday, June 26, 2019 | 8:00 AM - 12:00 AM
- Thursday, June 27, 2019 | 8:00 AM - 12:00 AM
- Friday, June 28, 2019 | 8:00 AM - 11:00 AM

**Note: The Images, Attachments, and Reserved Times tabs will ONLY display if information of the corresponding type is available for that particular location. Only the tabs containing information will appear.*

Furthermore, under Meeting Spaces, each entry may contain an additional piece of information in the upper right-hand corner of their row. Meeting Spaces will display the associated Venue name if available. These boxes are clickable back to their respective entry.



Managing Locations

Maps and Layouts information can be added both manually in the WordPress backend and imported through the Import functionality.

Import Locations (recommended)

In order to create multiple location entries at one time, it is recommended to use the Resume Import functionality to upload locations.

Click on the Import icon (arrow pointing up) in the upper-right hand corner of your screen (frontend).

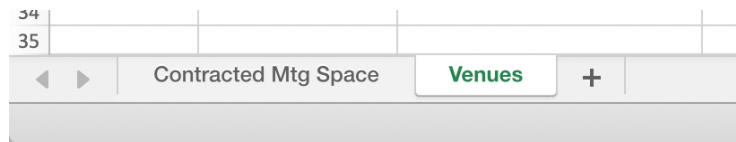


**Note: be sure to first read import instructions provided on this screen as these could have been updated more recently than this documentation.*

If no Maps & Layouts data currently exists in the Resume (no manual entries and/or no previous imports), download a Blank Location Template for your use:



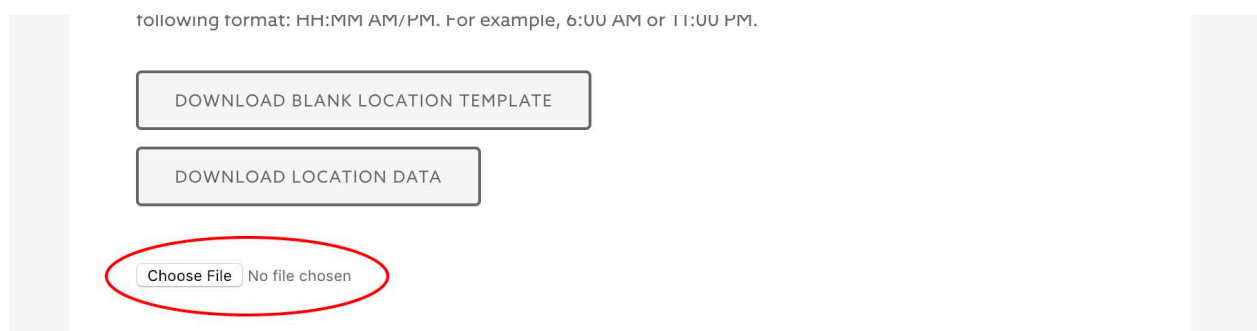
You may only import either Venues or Meeting Spaces at one time; not both together. To do so, choose from the worksheet tabs at the bottom of the template which type of location data you will be importing. It is recommended to import Venues first because you can then later associate Meeting Spaces to its respective Venue with the Venue ID.



When filling out both the Venues and/or Meeting Spaces spreadsheet, the Venue ID and Meeting Space ID column is imperative for a successful import and there are a few options when it comes to filling out this field. You may:

- Create a new entry with a system-generated ID by leaving the ID cell blank.
OR
- Create a new entry with an ID of your choice by putting your chosen ID in the cell (must be unique and be no more than 30 characters in length).

Verify the worksheet you would like to import in your spreadsheet is properly named according to the on-screen instructions and your Excel file has been saved as the proper filetype (.xls or .xlsx). Click "Choose File" from the Import page and locate the Excel file saved on your computer.



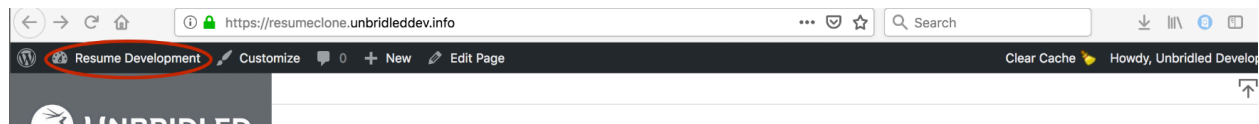
Important: by clicking the checkbox at the bottom of the screen, you will overwrite any existing data of that chosen datatype (in this instance, Maps & Layouts data) upon import. All existing data and any associated data with those locations will be deleted. Any links created between the existing data (such as images and/or attachments) will be broken and have to be re-linked. Click "Next" to proceed to Step Two.

In Step Two, map the header fields of your import to the Resume Import Fields.
*Note: The ID and Name fields must be mapped. Click "Next" to proceed to Step Three.

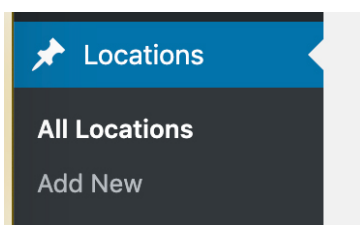
In Step Three, verify your choices to be mapped to the Resume on this screen before clicking "Submit." Once submitted, you should receive a message that tells you if your import was successful and whether or not any rows were skipped due to data inconsistencies. If rows were skipped, address the inconsistencies and re-import the data.

Adding Images and Attachments to Locations

To add images or attachments for newly imported locations, you will need to manually edit each entry in the WordPress backend. To do so, navigate to the backend.



Click "Locations" in the left-hand navigation menu and find the location entry you would like to update.



Scroll down to the bottom of the form and click "Add Image" or "Add Attachment."

Images

Image

Add Image

Attachments

Title *

File *

Add Attachment

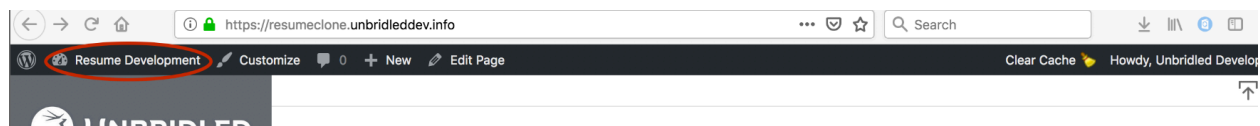
Update Delete

Choose the file from your computer and upload the image and/or attachment here. Supported filetypes include JPG, PNG, PDF, Word Doc and Excel files. Maximum allowable file size is 128MB.

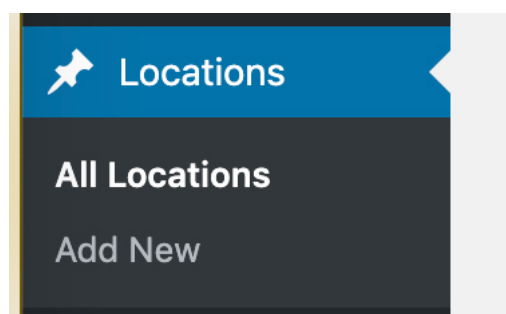
Be sure to click the blue "Update" button at the top of the screen to save.

Manually Add Locations

In order to add locations manually, navigate to the WordPress backend.



Click on "Locations" in the left-hand navigation menu and select Add New from the "Locations" sub-menu.



Add the location name in the first field that reads "Enter title here." Fill out the rest of the form below using the dropdown field for the Location Type.

**Note: to create a manual location, Location ID must be specified.*

Once all known information has been added, click “Publish” at the top of the page on the right-hand side of the screen to save.

The new entry should now appear in the list under Maps & Layouts.

Update Locations

Locations can be updated through the Resume Import functionality. Click on the Import icon (arrow pointing up) in the upper-right hand corner of your screen (frontend).



Click “Maps & Layouts.”

Click the button to download “Existing Location Data.”

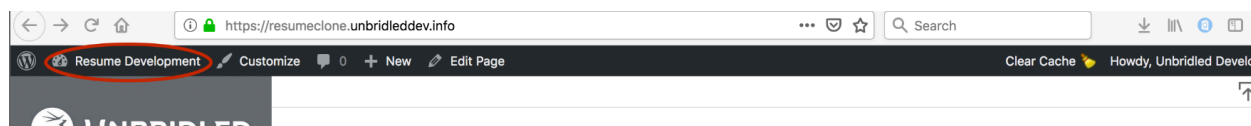
Edit the data as necessary but taking care to ensure the ID field remains the same. New entries can also be added to this list by repeating steps from above and ensuring the ID field is left blank or filled in with a unique ID with each new row.

Important: all Reserved Times must be present in the spreadsheet at the time of upload; the system treats this field as a collection and the entire collection will be overwritten each time it is chosen for mapping.

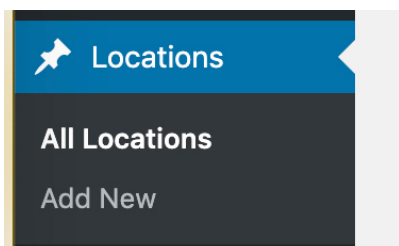
**Note: if the Location ID for an existing location changes upon import, a duplicate entry will be created with a new ID.*

Delete Locations

In order to delete a location, navigate to the backend of WordPress. Deletions cannot occur on the frontend or via an import.



Click "Locations" in the left-hand navigation menu.



Click on the desired location from the list provided and select "Move to Trash" from the right-hand side of your screen.



PROGRAM BRIEFS

Program Briefs is an ideal place to compile and store all outlying information that cannot be specifically attached to one person, agenda item or location. This could be, but is not limited to, contracts, budgets, transportation schedules, AV & Production stage renders, etc.

Add a Program Brief

Program briefs can be added in the WordPress backend. To get here, click on the Import icon (arrow pointing up) in the upper-right hand corner of your screen (frontend).



Select "Program Briefs."

If the desired information falls under one of the categories listed, select it here. If the desired information, does not fall under any of the stated default categories, click "Add New" at the top of the page.



Add a title and select an icon of your choice.



Add New Program Brief

Enter title here

Icon

i

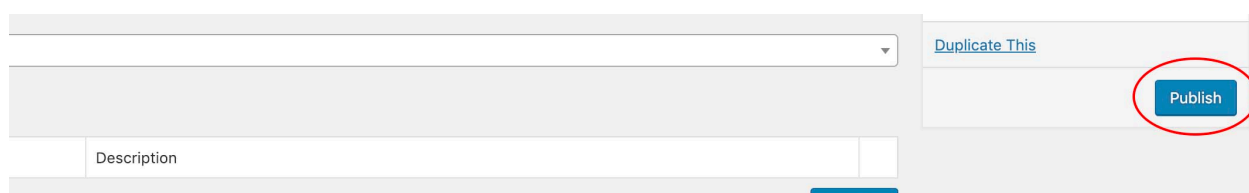
info-circle

There are some documents that Unbridled may wish to store in the Resume but still keep confidential. Clicking the checkbox under 'Visibility' gives users that option.

Information on the individual Program Brief page can be added through a general text box field under 'Information' and/or by uploading files and/or images. Information added in the text box field and uploaded files should be given titles to provide clarity and organization on the frontend of the website.

**Note: Allowable files to be uploaded include PDFs, Word documents and Excel files. The maximum allowable file size is 128 MB (this includes images).*

Click "Publish" to save your brief to the Resume.



Duplicate This

Publish

Update/Delete Program Brief

Updating and deleting Program Briefs can be done by following instructions listed above. Click on the already existing brief from the Program Brief list in the WordPress backend to edit information, add files/images, update visibility settings. Click "Update" when finished to save changes.

A "Move to Trash" link on the right-hand side of the screen will delete the Program Brief from the frontend of the website.

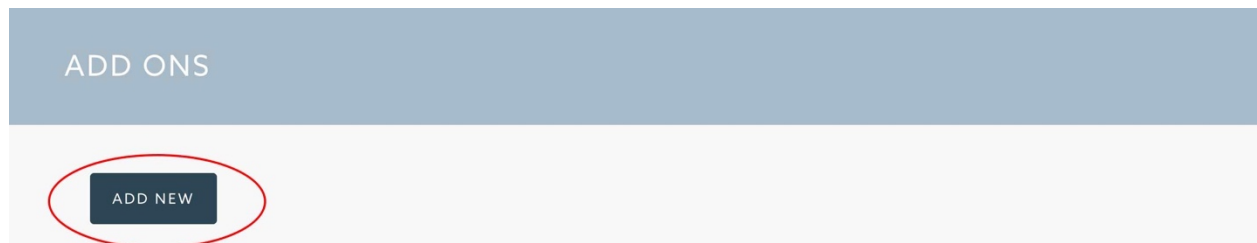
<div></div>		Edit
<div></div>		Duplicate This
		Move to Trash <input type="button" value="Update"/>
Description		
	Food and beverage information goes here.	

ADD ONS

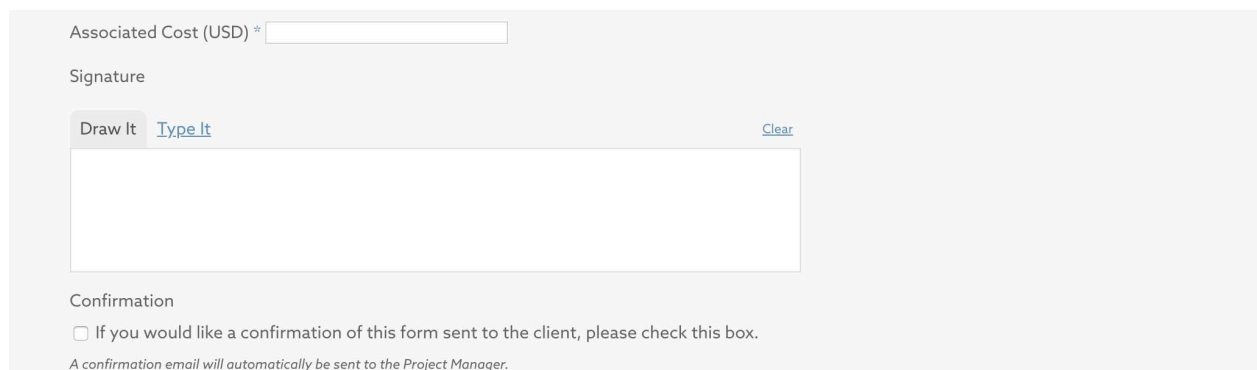
The Add Ons section of the Resume is designed to be used for last minute add on or change requests to the program.

Create an Add On Request

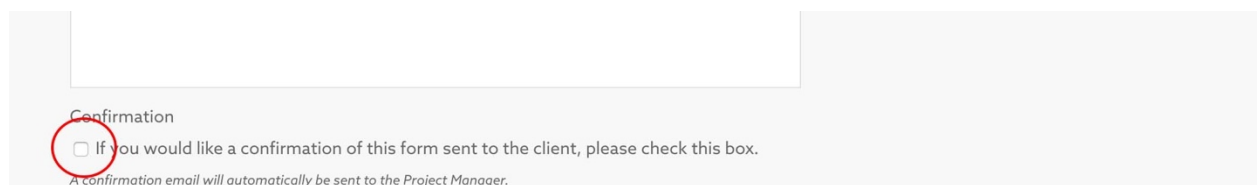
If a user would like to create a new Add On request, navigate to Add Ons from the Resume left-hand navigation (frontend) and click "Add New" at the top of the page.



The form should be filled out in its entirety and if desired, can be signed for authorization by whomever requested the add or change.

A screenshot of the Add On request form. The form is light gray and contains the following fields: 'Associated Cost (USD) *' with a text input field, 'Signature' with a 'Draw It' button and a 'Type It' link, and a 'Confirmation' section with a checkbox and a note: 'A confirmation email will automatically be sent to the Project Manager.' There is also a 'Clear' link next to the 'Type It' link.

Once completed, a copy of the Add On form will automatically be emailed to the Project Manager that filled out the request form. If desired, a copy of the form can also be sent to the Client (at the email provided in the form) by clicking the checkbox at the bottom of the form before submitting.

A close-up screenshot of the 'Confirmation' section of the Add On request form. It shows a checkbox with the text 'If you would like a confirmation of this form sent to the client, please check this box.' and a note: 'A confirmation email will automatically be sent to the Project Manager.' The checkbox is circled in red.

Editing or Deleting an Add On Request

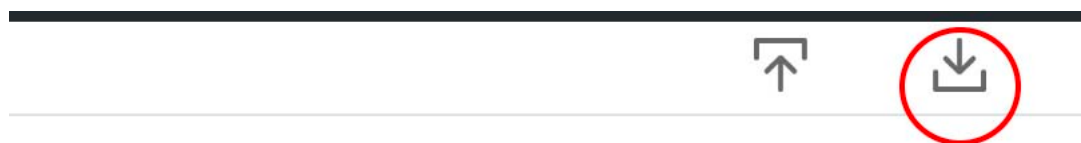
All add on requests will be visible from the Add Ons main page and can be edited or deleted from the 'Modify' column by the user who created the request.

DOWNLOADS

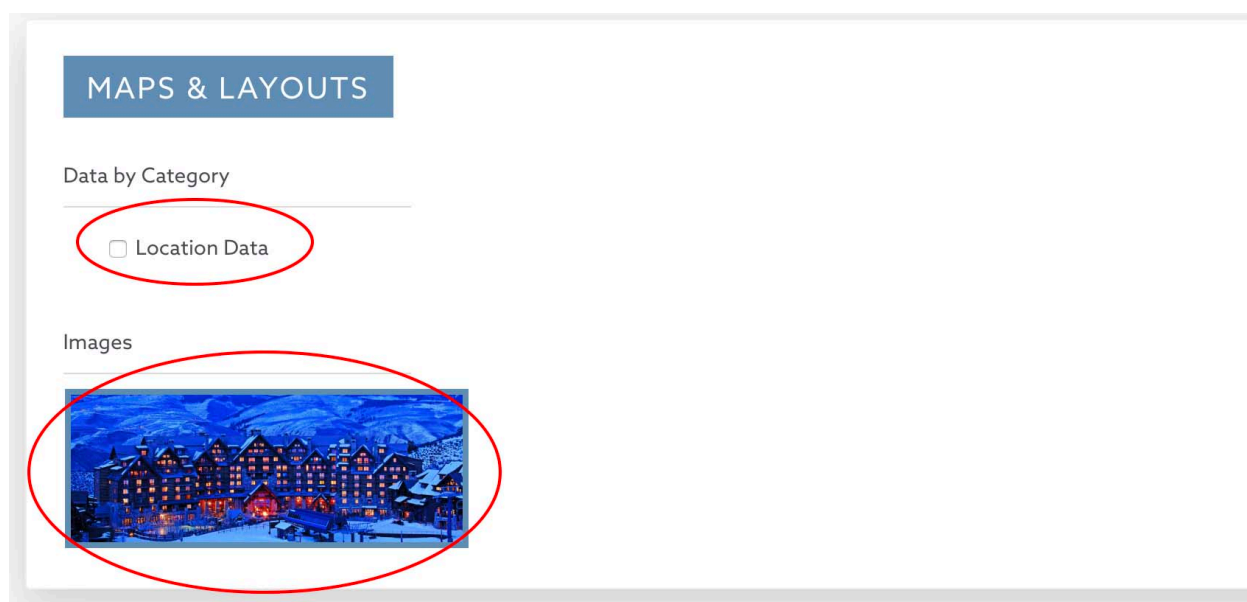
The Downloads section allows the user to export much of the data being stored in the Resume for printing or to maintain local copies.

Important: *It should be noted that Resume data is likely to change often, and it is advised to pull updates from the website regularly.*

To download, click on the Download icon (arrow pointing down) in the upper-right hand corner of your screen (frontend).



The Download page has been divided into four sections – People, Agenda, Maps & Layouts and Program Briefs. Review each category and click the checkbox next to an item if you would like to include it in your download. Images can be selected by clicking on them.



Once the user has chosen all items for download, they have two options to receive their files. They can 1) choose to have a zip file of the items emailed to them or 2) they can choose a direct download from the Resume site.

If the user chooses to send their files via email, they will be required to enter in a 'To' and 'From' email. They will receive a zip or compressed directory of the files immediately to their email.



The image shows a user interface for handling files. At the top, there are two blue buttons: 'EMAIL ZIP FILE' on the left and 'DOWNLOAD ZIP FILE' on the right. Below the 'EMAIL ZIP FILE' button, there are two text input fields. The first is labeled 'To (email)' and the second is labeled 'From (email)'. At the bottom left, there is a blue button labeled 'SEND'.

If the user chooses Download at the bottom of the screen, the files will be compressed and the zip file will download directly to their local computer. If the user is on a mobile device, the files will download individually.