TRB Annual Meeting Event Planner (Volunteer) User Guide
# TRB Annual Meeting Event Planner (Volunteer) User Guide

Last updated by Gareth Driver, 5/16/2018

## Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to log into MyTRB</td>
<td>3</td>
</tr>
<tr>
<td>Create an Event</td>
<td>4</td>
</tr>
<tr>
<td>Adding Presiding Officers</td>
<td>7</td>
</tr>
<tr>
<td>Adding Presentations</td>
<td>11</td>
</tr>
<tr>
<td>Creating Presentations</td>
<td>14</td>
</tr>
<tr>
<td>Event Descriptions</td>
<td>16</td>
</tr>
<tr>
<td>Manage/Edit an Event</td>
<td>21</td>
</tr>
<tr>
<td>Presentations</td>
<td>24</td>
</tr>
</tbody>
</table>
How to log into MyTRB

1. Log on to MyTRB. If you have problems logging in, please contact the MyTRB helpdesk at 202-334-1738 or email at MyTRB@nas.edu. Please note the “Forgot Password” or “New User Signup” options in the middle of your screen. Use these options to recover your password or create a new account.

2. Enter your email and password in the corresponding fields, then click the “Sign In” button.

3. Once logged into MyTRB, click the Annual Meeting Link.
Create an Event

1. Once logged in, you should see a tab titled “Event Planning”. If you do not see that tab, contact your staff officer.

2. First, click the "Event Planning" tab. Next, click the "Create Event" button.

3. To create the event, fill out all the required fields. Each required field is marked with a red asterisk mark. You will not be able to create an event until all the required fields are entered.

   *Event Title: Enter a title for your Event.

   *Event Type: Select an event type for your Event. You can choose one from the list of these event types.

   - P – Poster Session
   - S – Lectern Session
   - W – Workshop

   *Primary Sponsoring Committee: Select the Primary Sponsoring Committee for this event. You can only choose the committee that you are assigned to.
<table>
<thead>
<tr>
<th>Event Title</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Event Type</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Primary Sponsoring Committee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Must choose before adding any more information. Only committees may be primary sponsors. (Please note that changing the Primary Sponsoring Committee after creating an event may cause you to lose access to the planning dashboards for that event.)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Select an Option</th>
</tr>
</thead>
</table>
4. Select any co-sponsoring committees to your event by clicking on the title of that committee. After choosing a co-sponsor, you will be asked if you discussed the co-sponsorship with the leaders of that committee.

**Co-Sponsoring Committees:** These committees are co-sponsors for that event.

To add the Co-sponsoring committee to your event, click the desired co-sponsor on the “Available Co-sponsors” box (on the left) to appear on the “Chosen Co-Sponsor box” (on the right)

The chosen co-sponsoring committees will appear in the order in which they were selected.

To remove the chosen co-sponsoring committee, click the desired co-sponsoring committee. Then, it will be removed from your “Chosen Co-sponsors” box.

5. Select up to three subject areas by clicking on a subject in the "Available Subjects" list. Once clicked, the subject will move to the "Chosen Subjects" list.

**Subject Area:** This is the main subject area focus of the event

6. If this event is eligible to be an AICP Certification Maintenance Event, click the dropdown and select “Yes”. For further information, please visit this site.
   - [http://www.trb.org/electronicsessions/webinarpdh.aspx](http://www.trb.org/electronicsessions/webinarpdh.aspx)
Adding Presiding Officers

7. To add a presiding officer to this event, click the “Add Presiding Officer(s)” button.

You can search by name, email, or organization. Press the “Search” button to find results

If your search results were found, and if you wish to add the correct presiding officer to the event, click the checkbox in the “Select” column to select the correct Presiding Officer. Then click the “Add Presiding Officers” button below to add.
Once added the presiding officer will be added to the Event.

Note: You can add multiple presiding officers. To add additional presiding officers, click the “Add Presiding Officer(s)” button.

If you have multiple presiding officers, you can change the order of how they will be listed. Select the up arrow to move it higher, and the down arrow to move it lower.
To remove a presiding officer, click the “Remove Presiding Officer” button.

After you search for a Presiding officer, and you do not find the correct result, you can create a new Presiding Officer. Click the “Create Presiding Officer” button to start the process.

The “Create Person Record” screen will appear. On this screen, fill in the required fields (marked with a red asterisks).
In order to associate with a company, press the "Choose Company" button and search.

Search for a Company by typing in a name in the Name field, then press "Find Companies" to view the results.

When the results appear, press "Choose" next to the existing company you wish to associate.
If you wish to create a new company that doesn't currently exist, from this screen you can press the "Create Company" button.

Then, fill out the required fields and press the "Create Company" button.
Once done entering an existing or new company and other required fields, press the "Create Account" button on the Create Person Record.

NOTE: This action will create a new MyTRB account. If you have reason to believe that the desired person already has a MyTRB account (e.g. you have added them in a previous year) please contact the MyTRB help desk at 202-334-1738 or MyTRB@nas.edu to locate the profile, rather than creating a duplicate account.

Adding Presentations

8. To add a presentation to your event, click the “Add Presentation(s)” button.

You will see a list of all your available presentations. To add the presentation to your event, click the checkbox next to each presentation. Then, click the “Add Presentation” button.
The list below contains the papers reviewed by your committee and accepted for presentation (17-XXXX) and presentations that have been created for a committee session (P17-XXXX). If you have arranged to include another committee's paper(s) in one of your sessions, your TRB staff officer will need to add that paper. You can select more than one presentation at a time. Once a presentation has been assigned to a session, the presentation will no longer appear on the list.

<table>
<thead>
<tr>
<th>Number</th>
<th>Title</th>
<th>Corresponding Author/Presenter</th>
<th>Recommendation</th>
<th>Committee</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>P17-20003</td>
<td>Sample Freight Rail Presentation</td>
<td>Scott Babcock</td>
<td>-</td>
<td>AR040 - Standing Committee on Freight Rail Transportation</td>
<td>❌</td>
</tr>
</tbody>
</table>
Once you click the “Add Presentation” button, you will see the presentation displayed.

You will see the title, number, duration, and list of all the presenters.

If you have multiple presentations, you can change the order of how they will be listed. Select the up arrow to move it higher, and the down arrow to move it lower.

To remove the presentation, click the “Remove Presentation” button.
Creating Presentations

9. To create a speaker presentation, click the “Add Presentation(s)” button on the event. Note: There are two ways to create an invited speaker presentation. The steps below will guide the user on how to create an invited speaker presentation during the process of creating an event.

You will see a list of all your available presentations. To create an invited speaker presentation, click the “Create New Presentation” button.

To create an invited speaker presentation, you must fill out all of the required fields that are listed below.

*Title: The title of the Invited speaker presentation

*Assigned Committee: The committee that you would like to add this speaker presentation to.

*Presenter: At least one presenter is required for a speaker based presentation.
For the Assigned Committee field, you can only select the committee that you are assigned to.

To add a presenter to this invited speaker presentation, click the “Add Presenter” button.
You can search by name, email, or organization. Click the “Search” button to find results.

If your search results were found, and if you wish to add the correct presenter to the presentation, click the checkbox in the “Select” column to select the correct presenter. Then click the “Add Presenters” button below to add.
If the desired presenter was not found, you can add a new presenter by clicking the “Create New Presenter” button.

1. The “Create Person Record” window will appear. On this screen, fill in the required fields (marked with a red asterisk).

   First Name*  
   Last Name*  
   Email*  

To keep a consistent set of organization and company names we ask that you choose from our existing list. If possible, if at first you do not find the company you are looking for, you might try searching with just the first few letters or another known variation of the name.

Company*  
Country*  
Address

In order to associate with a company, press the "Choose Company" button and search.
Search for a Company by typing in a name in the Name field, then press "Find Companies" to view the results.

When the results appear, press "Choose" next to the existing company you wish to associate.
If you wish to create a new company that doesn't currently exist, from this screen you can press the "Create Company" button.

Then, fill out the required fields and press the "Create Company" button.
Once done entering an existing or new company and other required fields, click the "Create Account" button on the Create Person Record page.

NOTE: This action will create a new MyTRB account. If you have reason to believe that the desired person already has a MyTRB account (e.g. you have added them in a previous year) please contact the MyTRB help desk at 202-334-1738 or MyTRB@nas.edu to locate the profile, rather than creating a duplicate account.

10. After you have finished filling out all of the required fields, click the “Create” button to create the invited speaker presentation.
You will see the invited speaker presentation added to the event.

You will see the title, number, duration, and list of all the presenters.
If you have multiple presentations, you can change the order of how they will be listed. Select the up arrow to move it higher, and the down arrow to move it lower.

To add the duration of the presentation, type in the number of minutes on the Duration field.

To remove the presentation, click the “Remove Presentation” button.

For an invited speaker presentation only, you can edit that presentation. Click the “Edit Presentation” button to edit the invited speaker presentation.
The “Edit Presentation” button will take the user to the Edit Presentation record. After editing the invited speaker presentation, click the “Save” button.

<table>
<thead>
<tr>
<th>Title</th>
<th>Invited Speaker Presentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abstract</td>
<td>Optional Abstract</td>
</tr>
<tr>
<td>Presenters</td>
<td></td>
</tr>
<tr>
<td>Presenter Name</td>
<td>Andrew Halnes</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:ahalnes42@x_aol.com">ahalnes42@x_aol.com</a></td>
</tr>
<tr>
<td>Company</td>
<td></td>
</tr>
</tbody>
</table>

Use the form below to create an invited presentation. Papers should not be entered or added to a session using this form. After you create a presentation, any changes must be entered from the session page by clicking on the “Edit Presentation” button after the presentation.
Event Descriptions

11. Depending on the event type, you will see different description boxes.

<table>
<thead>
<tr>
<th>Poster Session</th>
<th>Workshop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event Description</td>
<td>Event Description</td>
</tr>
<tr>
<td>Event Notes</td>
<td>Event Details</td>
</tr>
<tr>
<td></td>
<td>Event Notes</td>
</tr>
</tbody>
</table>

The table above displays the list of descriptions for each event type.

**Event Description**: Only descriptions for workshops will be included in the printed program. The character limit is 500 characters including spaces.

**Event Details**: Event details (any length) appear in the Online Interactive Program (O.I.P) and mobile app.

**Event Notes**: General notes about event that will not appear in the printed program, OIP, and/or mobile app. Typically, event notes are used by session organizers or TRB staff for reminders, potential topic lists, etc. DO NOT use this field to communicate with TRB staff.
12. After you have finished filling out all of the available information, you will have the following options:

**Save and Continue:** If you click this button, you will save the event and have the ability to continue working on the event.

![Save and Continue Button]

**Save and Exit:** If you click this button, you will save the event and exit the page.

![Save and Exit Button]
Manage/Edit an Event

Once you saved an event, you can make changes to that event. Once logged in, you should see a tab titled "Event Planning". If you do not see that tab, contact your staff officer.

1. First, click the Event Planning tab. Secondly, click the “Manage Events” button

2. From here, you will see a list of your events.

Tip: To filter out your list of events by a specific keyword, type within the filter box located on the top right hand corner.

Tip: You can sort your events by clicking on the column headers.
3. If you are an event planner for more than one committee, you can toggle between the committees by utilizing the dropdown.

4. To edit an event, click the “Select” button and then click the “Edit Event” button.

After you click the “Edit Event” button, you will see the event’s details and information. You can edit the event at this page.

**Edit Event**

You can only edit sessions until October 1 – after this date changes must go through TRB staff and become increasingly more difficult to accommodate. Please refer to the Standard Room Setup document when planning your session – if you would like different room set-ups, need additional help or wish to accomplish your event goals.

**Editable View**

**Printable View**
5. If you would like a list of all participant emails, click the “Copy Participant Emails” button at the top of the Edit Event screen to copy them to the clipboard.

6. If you would like to see the printable view of the event, click the “Select” button on the list of events, then click “Printable View”.
Presentations

To see a list of all your available presentations, click the “Presentations” button.

1. To see a list of all your available presentations, click the “Event Planning” tab, then click the “Presentations” button.

2. You will see a list of all your paper-based presentations and speaker-based presentations.

Tip: You can filter out your list of presentations by typing in the filter box.

Tip: You can sort your presentations by click the Column headers.
3. To view a paper-based presentation, click the “Select” button, and click the “View Presentation” button.

4. To edit a speaker-based presentation, click the “Select” button, and click the “Edit Presentation” button.

You will be able edit the speaker-based presentation using this form.
5. To create an invited speaker presentation, click the “Create Speaker Presentation” button.

<table>
<thead>
<tr>
<th>Presenter Name</th>
<th>Michael Conners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td><a href="mailto:ak@ortb.org">ak@ortb.org</a></td>
</tr>
<tr>
<td>Company</td>
<td>AECOM</td>
</tr>
</tbody>
</table>

Committee Presentations

The list below contains the papers reviewed by your committee and accepted for presentation (15-XXX) and presentations that have been created for a session. If you have arranged to include another committee’s paper(s) in one of your sessions, your TRB staff officer will need to add that paper. You can select more than one presentation has been assigned to a session, the presentation will no longer appear on the list.

AFK20 - Standing Committee on Characteristics of Asphalt Materials
To create an invited speaker presentation, you must fill out all of the required fields that are listed below.

* **Title**: This would be the title of the invited speaker presentation

* **Assigned Committee**: This would be the committee that you would like to add this speaker presentation to.

* **Presenter**: At least one presenter is required for a speaker based presentation.

For the Assigned Committee field, you can only select the Committee that you are assigned to.

To add a presenter to this invited speaker presentation, click the “Add Presenter” button.
You can search by name, email, or organization. Click the “Search” button to find results.

If your search results were found, and if you wish to add the correct presenter to the presentation, click the checkbox in the “Select” column to select the correct presenter. Then click the “Add Presenters” button below to add.
After you finished filling out all of the required fields, click the “Create” button to create the invited speaker presentation.