

# Sort events and breakout sessions into categories

---

After you [add events](#) and [breakout sessions](#) to the portal, the portal automatically sorts them by their scheduled date and time. Depending on the portal layout you select, you can further group your events with automatic grouping and sort events into tabs by broadcast date or into custom *categories* (or *tracks*) you create.

## Select a layout

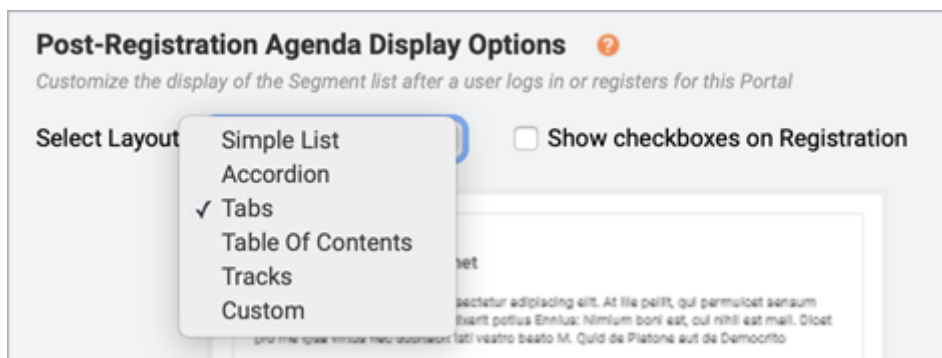
Before you categorize events and breakout sessions, you must select the correct layout.

Sign in to the Webcast Admin portal and edit the portal.

### To select a layout:

1. On the left panel, click the **Portal Layout** tab.
2. Under **Post-Registration Agenda Display Options**, select the:
  - **Tabs** layout to sort events into broadcast date tabs.
  - **Accordion**, **Tabs**, **Table of Contents**, or **Tracks** layout to sort events into custom categories.

**Note:** Simple List and Custom layouts do not support automatic grouping.

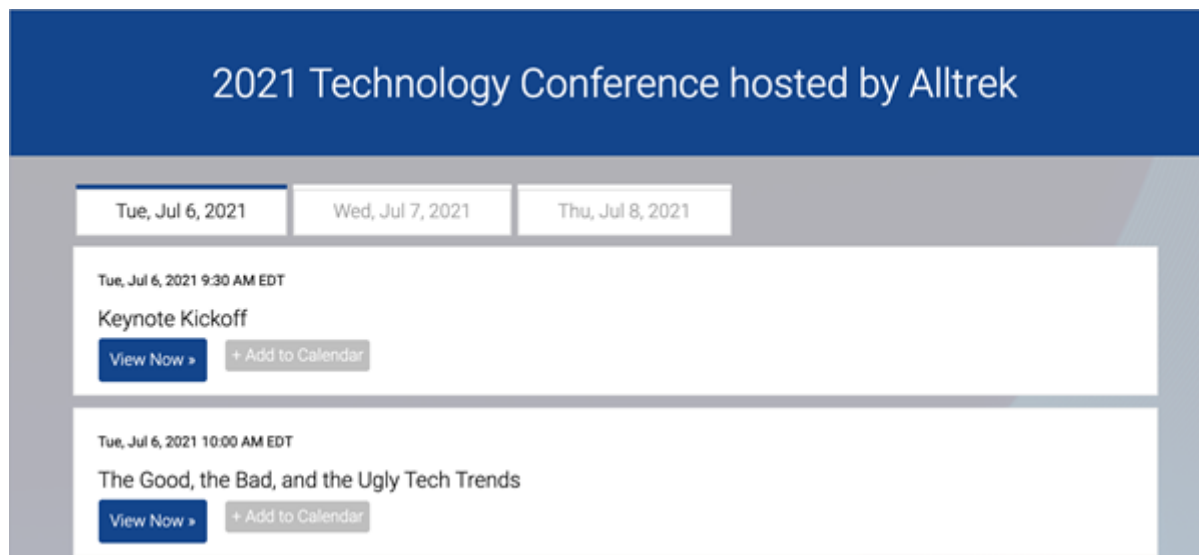


3. Click **Save and Continue**.

## Sort with broadcast date tabs

If your conference takes place over several days, you can automatically group them into tabs with their scheduled date. If the date of an event or breakout session changes, it is automatically sorted into the correct date tab on the portal.

This is an example of a portal with a Tab layout and events sorted into broadcast date tabs.



**To sort events and breakout sessions into tabs by date:**

1. On the left panel, click the **Manage Segments** tab.
2. On the Manage Segments tab, click **Manage Categories**.
3. On the Manage Categories window, under Automatic Grouping, select **Broadcast date tabs** and then click **Save**.

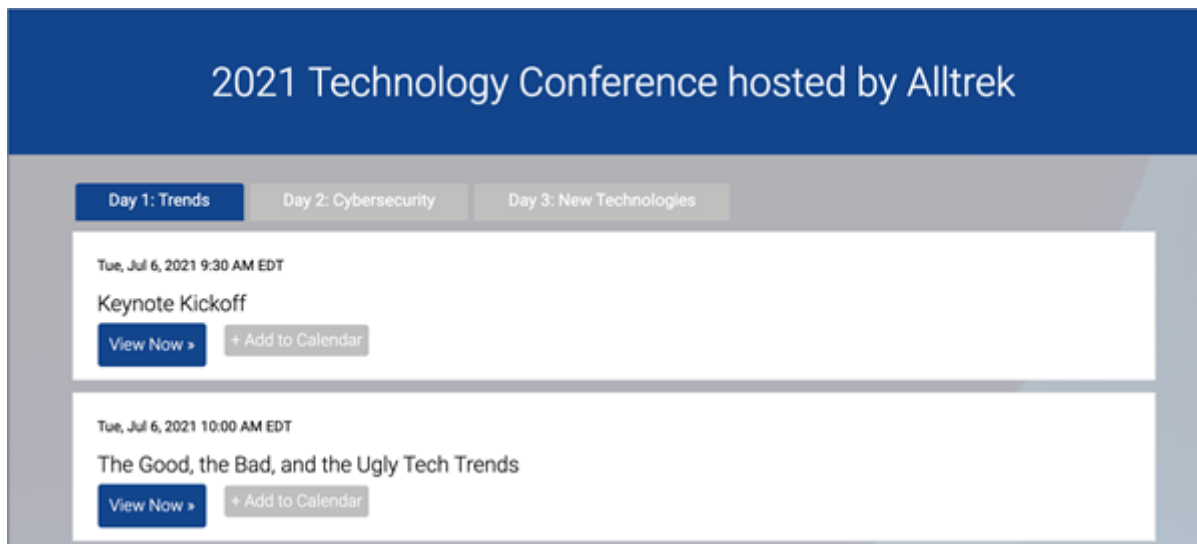
A screenshot of the "Manage Categories" window. At the top left is the title "Manage Categories" with a help icon. At the top right is a "+ New Category" button. Below the title is the "Automatic Grouping:" section with three radio buttons: "None", "Upcoming events category", and "Broadcast date tabs" (which is selected). To the right of the "Broadcast date tabs" radio button are a "Prefix:" text input field and a "Date Format:" dropdown menu showing "Thu, Apr 8, 2021". Below this is a table with five columns: "Order", "Category ID", "Display Name", "Show", and "Remove". The table is currently empty. At the bottom center is a blue "Save" button.

4. Then on the Manage Segments tab, click **Save and Continue**.

## Sort with custom categories

Create your own custom categories to separate different conference days, topics, and more.

This is an example of a portal with a Tab layout and events sorted into custom categories.



**To sort events and breakout sessions into custom categories:**

1. On the left panel, click the **Manage Segments** tab.
2. On the Manage Segments tab, click **Manage Categories**.
3. On the Manage Categories window, under Automatic Grouping, select **None**.
4. Click **New Category** and enter a Category ID and a Display Name for each of your categories.

The Category ID is used to assign events and breakout sessions to the category in the Webcast Admin portal and does not display on the portal agenda page. The Display Name is the title of the category that viewers see on the portal.

**Note:** Category IDs can't contain any spaces or special characters.

## Manage Categories

New Category

Automatic Grouping:

☒ None
 ☐ Upcoming events category
 ☐ Broadcast date tabs: Prefix:  Date Format:

Order	Category ID	Display Name	Show	Remove
1	<input type="text" value="Day1"/>	<input type="text" value="Day 1: Trends"/>	<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>
2	<input type="text" value="Day2"/>	<input type="text" value="Day 2: Cybersecurity"/>	<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>
3	<input type="text" value="Day3"/>	<input type="text" value="Day 3: New Technologies"/>	<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>

Save

5. Once you've created your categories, click **Save**.

On the Manage Segments tab, a new Category column displays.

6. In the Category column, select a Category ID for each event and breakout session to assign them to categories.

**Note:** You must assign categories to all of your events and breakout sessions for them to display on the portal.

## Manage Segments for 2021 Technology Conference ho... (514698)

[Linked Segments](#)

Manage Categories
 Add Breakout
 Add Segments

Order	Event ID	Event Name	Event Status	Category	Show	Access	Segment ID	
1	514761	Keynote Kickoff	Scheduled for: Tue, Jul 6, 2021 9:30 AM EDT	Day1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	<input type="button" value="Edit"/> <input type="button" value="Remove"/>
9	514769	Step Up Your Cybersecurity Ga...	Scheduled for: Wed, Jul 7, 2021 9:30 AM EDT	Day2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	14	<input type="button" value="Edit"/> <input type="button" value="Remove"/>
16	514765	Emerging Markets: Autonomous ...	Scheduled for: Thu, Jul 8, 2021 9:30 AM EDT	Day3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	8	<input type="button" value="Edit"/> <input type="button" value="Remove"/>

Back to Summary
 Save and Continue

7. After you've assigned your categories, click **Save and Continue**.

Revision #3

Created 4 May 2022 13:00:32

Updated 12 August 2022 16:57:49