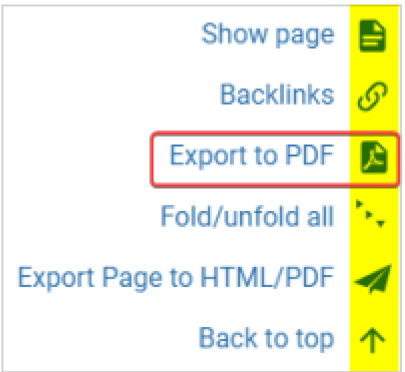
Conference Tracker - Quick Start Guide

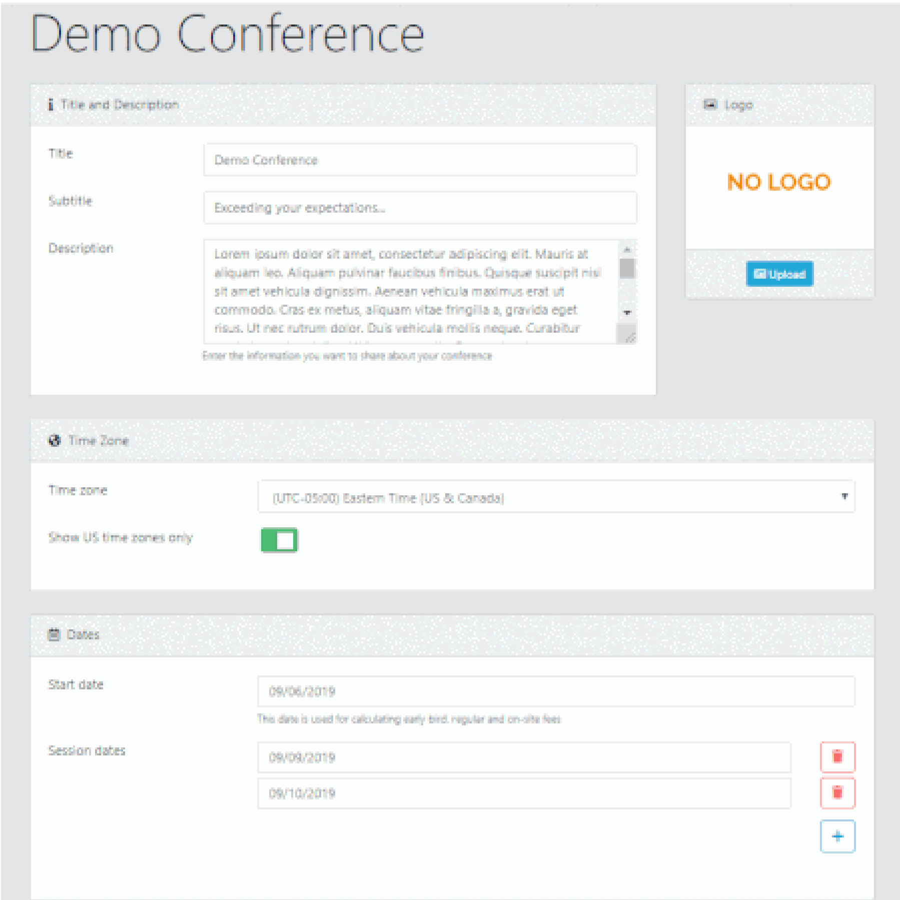


Welcome and thank you for using our Conference Tracker software! This quick start guide will go over the most important features of your account to assist you in quickly setting up your conference. If you would like to visit our full manual, which has more detailed instructions and explanations, **click here.**

If you would like to export this guide into a PDF file, you can do so by going to the right edge of this screen and clicking on the third icon from the top, labeled Export to PDF.

Basic Conference Information & Time Zone

The very first thing we will need to do to get started on your Conference Tracker setup will be to fill out some basic information about your conference and make sure your time zone is set to the correct one. All of these settings can be changed later on as well, so don't worry if you may not have some of this information yet!



To set up your basic conference information, go to **Conference** > **Setup** and complete the following boxes:

- **Title**: Input the name of your conference so your attendees know where they are!
- **Subtitle**: Enter a subtitle or slogan for your conference.
- **Conference Description**: Complete with a description for your conference. The description section is very customizable. You will have a set of formatting tools and can insert photos and links as well!
- **Time Zone**: Here is where you will set your conference's time zone. Choosing the correct time

zone is very important as most of the features provided by Conference Tracker work with time.
- **Conference Dates**: Choosing the correct conference dates will allow you to start scheduling your workshops accurately. These can be changed at any time.
- **Address**: Inputting your address will help your attendees find your conference. Our Conference Attendee app will show local weather and places of interest based on this address!
- **Website**: Here you can add the URL to your website so your attendees can visit it if they need any additional information.
- **Session Tracks/Enable Multiple Tracks**: Session tracks are a way to group your sessions/workshops. This can help you organize them better on your end, or offer them as packages to your attendees! This ticker will activate tracks. To find out more about sessions tracks, visit our full manual! Conference Tracker - Administrator Manual

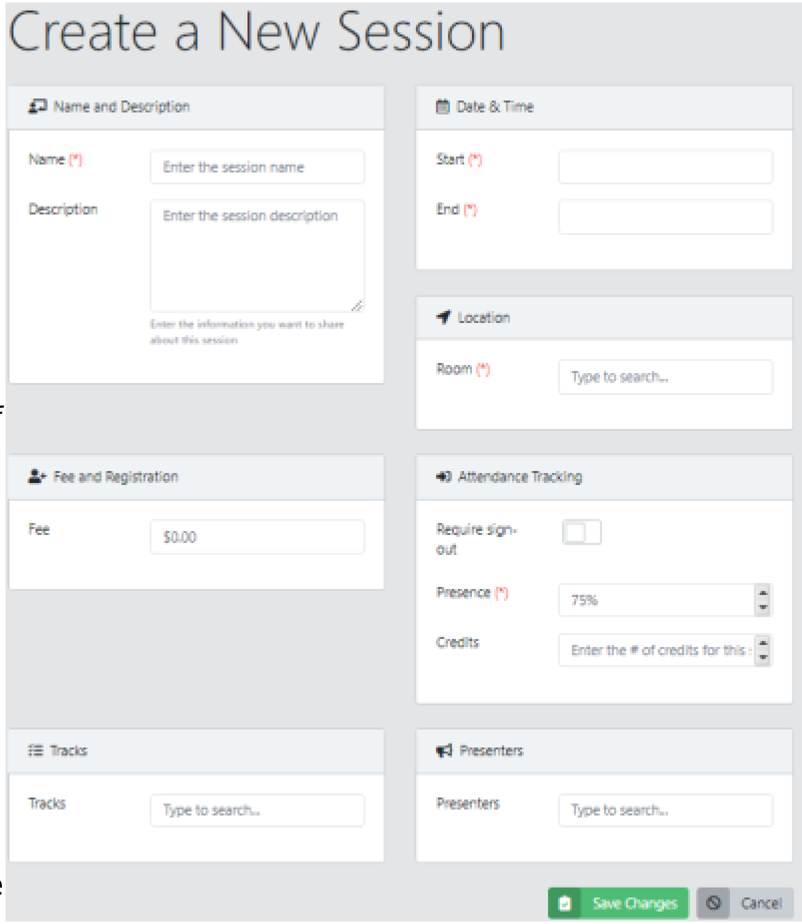
Conference Tracker also supports online registration for both attendees and exhibitors, streamlining your registrations immensely. If you would like to use our online registration system, you can enable them on this page, under the Online Registration section. You can enable and disable these at any moment as well.

Finally, the **License Information** section shows your current attendee limit and whether the **Conference Attendee** app and/or the **Conference Leads** app have been enabled. These are separate apps we offer our clients. If you would like to know more about these apps, or would like to increase your attendee limit, click on the links in this section and we will contact you with more information.

Once you are finished with this section, click the **Save Changes** button at the bottom to save all of your changes.

Create Conference Sessions

Now that your basic information is set up, we can go ahead and start creating your conference sessions/workshops! Your sessions will be all of the events, classes, or workshops your conference will be offering your attendees. You can set dates, times, credits, locations, and much more.



***NOTE:** This section will go over creating sessions manually. You can also choose to import your sessions using .CSV files. If you would like to find out more about importing, click here to visit our full manual. Advanced Options- Importing.*

Before creating any sessions, we will need to create Rooms for them to be assigned to. Rooms will just be locations in your conference hall in which your sessions are taking place. The reason we do this beforehand is due to sessions needing a location when setting up. If you have no rooms created, you won't be able to save your session information!

In order to create a room, we will navigate to Conference→Sessions. Once this screen loads, you will see three buttons, one of them labeled Rooms. Click on the Rooms button and you will be taken to the Rooms section, where you can create as many Rooms as you'd like! When creating rooms, all you will need is the room name and its location. For example, the room name could be the Yellow Event Room, while the location could be the room number itself.

Now that we have that out of the way, we can get started on creating your sessions. To create the Conference Sessions, go to **Conference** > **Sessions**.

Click the **Create** button to set up sessions in the conference.

On this next screen, you will see all of the information you can fill out for your session. In order to get this quickly done, the only required fields will be the following:

- **Name** - This will be the name of your workshop.
- **Start & End Times** - Here you can set when your workshop will be taking place. When clicking on these fields, you will be shown a small calendar to help you pick out the correct date and time.
- **Room** - As stated previously, this is the location within your conference hall in which your workshop will be taking place.
- **Presence** - Presence is the amount of time an attendee must be present at your workshop in order to receive full credit for it. This works off a percentage number.

All other fields are optional and can be filled in at a later time. For more information on these fields, visit our full manual! Conference Tracker - Administrator Manual

Once you are finished, you can click the **Save** button at the bottom of the section to confirm your changes.

How to Import your Session Information

Conference Tracker

Quick Reference Guide — Administrators

How to Import Your Session Information

Importing your attendees into Conference Tracker is a simple and easy process. All you need is a CSV file with your attendees' info, which you can build yourself or convert from an Excel file. Follow these steps and let your CT Support Team know if you have any questions.

Step 1

Build a CSV file with the following mandatory headers, typed as written: FirstName, MiddleInitial, LasName, Email. Each attendee should be on a different row. Make sure each one has a unique email address. To view other optional headers you can include, visit this page: https://conftrac.com/#/import/upload/learn

Step 2

Log into your Conference Tracker account. From the main menu, click Advanced Options > Import Data.

Step 3

In the "Import" section on the Import Data page, select, "Attendees" from the drop-down menu. Click, "Upload a File," and then select the file you wish to import.

Step 4

The import will now commence. CT will update with information regarding the stage of the upload, and the status box will turn green once the process is finished. If there are any errors that need to be corrected, CT will let you know.

Step 5

Your import is now complete, but we recommend checking the attendee list to make sure your attendees imported correctly.

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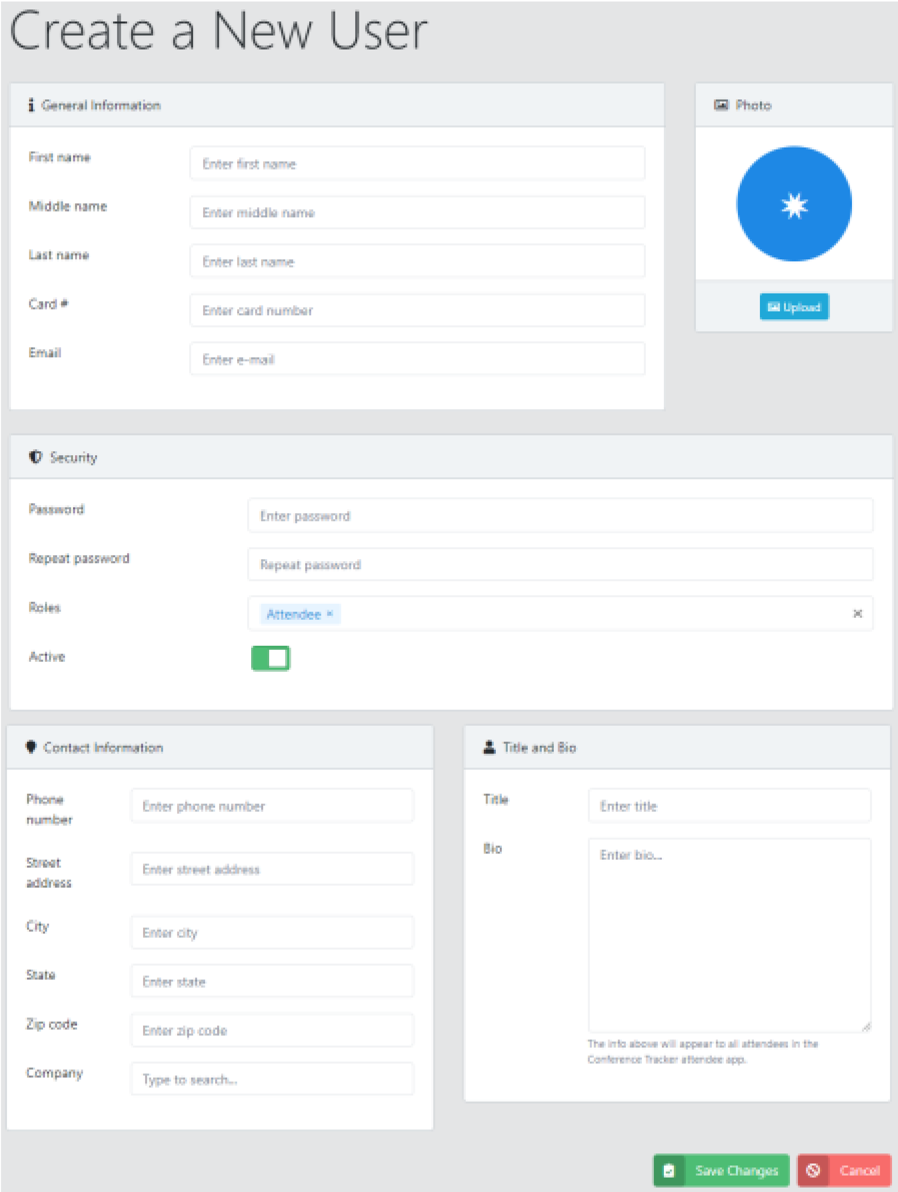
Creating Attendees



Next up, we'll go over adding **Attendees**, or guests, to your conference. There are three main ways to do this: importing them through CSV files, offering them a web based registration form, or manually creating them. We will be going over how to manually create an attendee here, but if you would like to find out more about importing attendees or creating an online registration form, click here. Advanced Options

To get started, we will navigate to **Attendees→Manage Attendees**. Once here, we will click on the blue Create button towards the top of the section.

When filling out an Attendee's profile, there are only four required fields. These are:

- **First and Last Name** - This will be your guest's full name.
- **Email** - Your guest's email address will go here. This is important as it will be the main identifier of a unique person on Conference Tracker.
- **Role** - Here you will pick what role the user you are creating will have. In this case, their role should be Attendee. If necessary, you can choose multiple roles for them. For more information on additional roles, visit our full manual. Conference Tracker - Administrator Manual

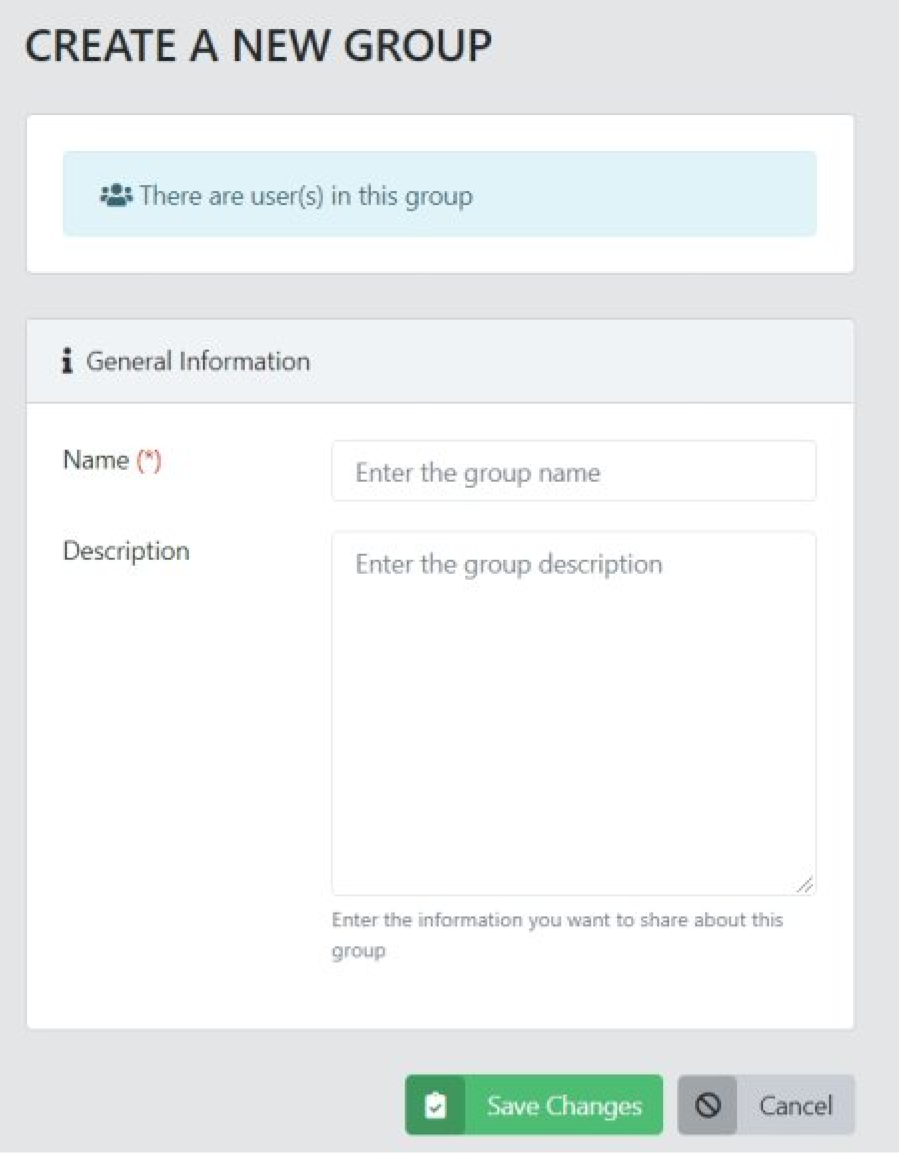
All other fields are optional and can be added at a later time.

Once you are finished adding the information, you can save your changes by clicking on the Save Changes button on the bottom right.

***NOTE:** A field that is important to take notice of is the Card # field. We recommend leaving this area blank. Conference Tracker will auto-generate a random string of letters and numbers in order to keep track of the card numbers. This will alleviate any issues due to duplicate card numbers.</note>*

Creating Groups

Next up, we'll go over adding **Groups**, this is a great way to gather users in categories. There are two main ways to do this: importing them through CSV files or manually creating them. We will be going over how to manually create them here, but if you would like to find out more about importing attendees or creating an online registration form, click here. Advanced Options



To get started, we will navigate to **Attendees→Groups**. Once here, we will click on the blue Create button towards the top of the section.

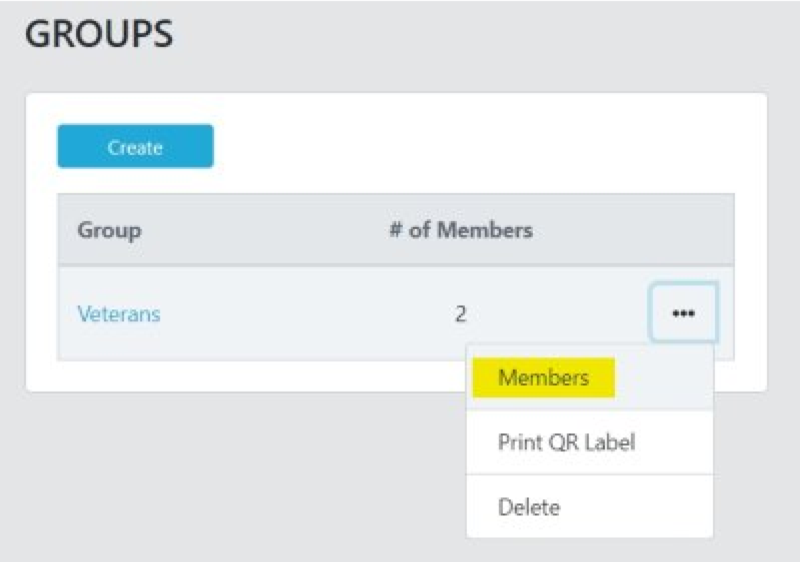
When filling out an Attendee's profile, there are only four required fields. These are:

- **Name** - This will be your group's full name and it is mandatory.
- **Description** - Your group descriptions/comments will go here. This is important as it allows for a description of the group but it is optional.

If necessary, you can choose multiple roles for them. For more information on additional roles, visit our full manual. Conference Tracker - Administrator Manual

Once you are finished adding the information, you can save your changes by clicking on the Save Changes button on the bottom right.

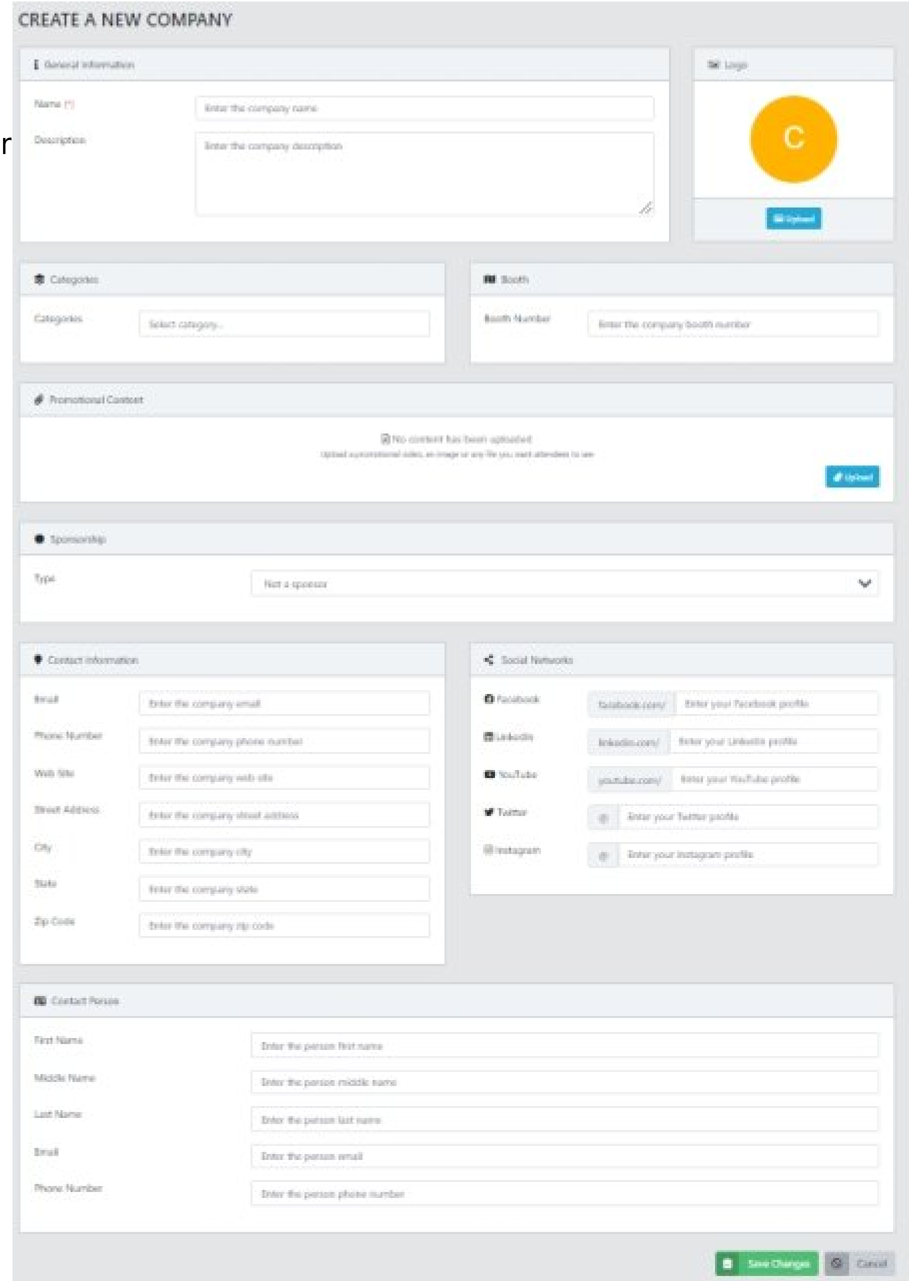
Adding Members to the group



Now you can go to the list of groups and click the three dots on the right of the group and click on **Members** to start managing/adding members to the group.

Creating Exhibitors

Next up, we'll go over adding **Exhibitors**(the companies that have purchased a Conference Leads license for your conference). We will be going over how to manually create an exhibitor here



To get started, we will navigate to **Exhibitors→Manage Exhibitors**. Once here, we will click on the blue Create button towards the top of the section.

When filling out a Company's profile, there are several blocks of fields. These are:

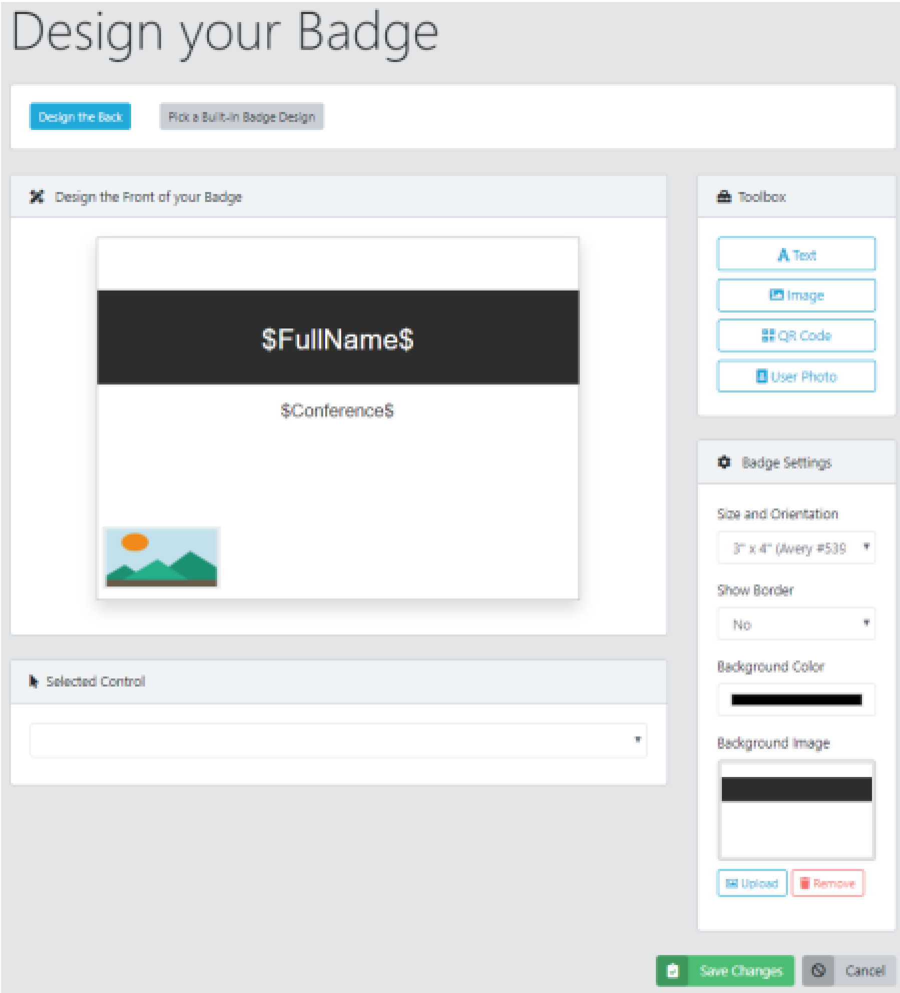
- **General Information section** - Here only the name is mandatory.
- **Logo section** - Here you can upload the logo for that company.
- **Categories section** - Here you can set this company in a specific grouping/category as needed.
- **Booth section** - Here you can assign a Booth to the company(this is usually used only for physical activities where the company has some physical space/kiosk)
- **Promotional Content section** - Here you can upload marketing/promotional material for the company so you can share it with the participants.
- **Sponsorship section** - Here you can categorize the company in levels of sponsorship (if applicable).

- **Contact Information section** - Here you can enter basic contacting information related to the company.
- **Social Networks section** - Here you can enter the company Social Network information.
- **Contact Person section** - Here you can enter basic contacting information from someone in the company who will be the main contact.

NOTE: Additionally you would want to add Exhibitors Admins and Reps, it is very similar to how you manage Attendees so please refer to that chapter in the guide.

Design Attendee Badges and Print

Badges are the main way of tracking your attendees and staff. Once designed, they will include each guest's important information and their QR code. The QR code will be the main tool used to sign attendees in and out of sessions. You can create multiple badge designs and have them personalized to fit each member.



To design your badges, go to **Badges** > **Manage Badges**. Here you will see a list of any created badges. To get started with the design process, click on the blue Create button towards the top of this section. If you'd like a full description of the functions of the badge designer, please click here Badges.

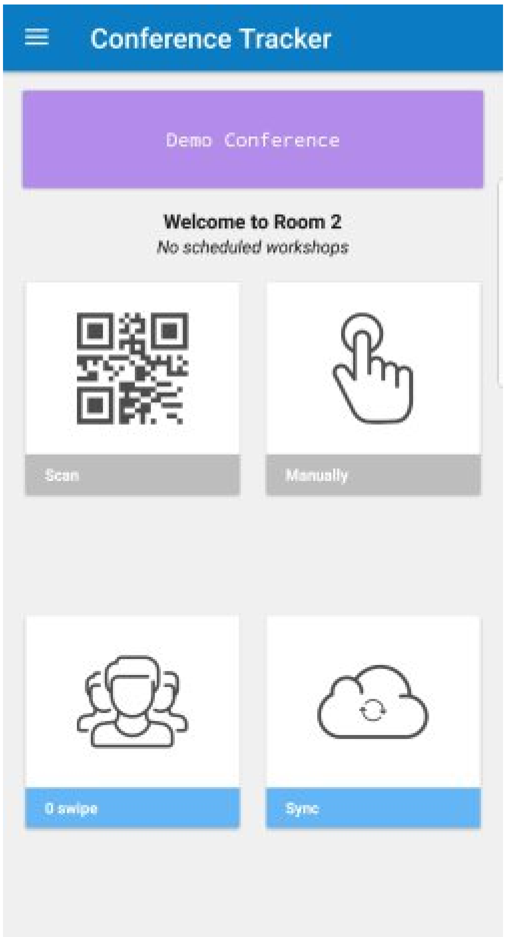
Once you have finished designing a badge, you can choose to print them. To access this section, we will navigate to **Badges → Print Badges**. Here you will be given a few options to personalize your badge printing, such as which badge design to use and who you would like to print badges for. You can choose to print badges for every member of your conference or go as specific as printing a badge for an individual only.

Once you have picked your options on how to print badges, you can press the blue Generate button on the bottom right of this section. The system will process and once it is finished, you will be shown a green button with your badges on the bottom left of this section. Clicking on here will allow you to download a PDF file with all of your chosen badges ready to print.

For more information on printing badges, please click here.

You can also email badges if you prefer not to print them yourself under **Badges → Email Badges**. The same steps apply as the Print Badges section. This way, you only have to reprint lost or forgotten badges at the conference. It may also cut down on costs for badge card stock, holders, and lanyards.

Record Attendance



Once your conference starts, your next step will be to keep track of your attendees visiting your sessions. Conference Tracker makes this easy by offering the Conference Tracker app for your mobile device. You can turn an Apple or Android device into a powerful scanner to sign-in/sign-out attendees. This app will record the attendance of all of your attendees and upload the data to your Conference Tracker account, which you can then view and export.

You must download the Conference Tracker app from either the Apple App Store or the Google Play Store:

Conference Tracker app on the Apple iTunes App Store

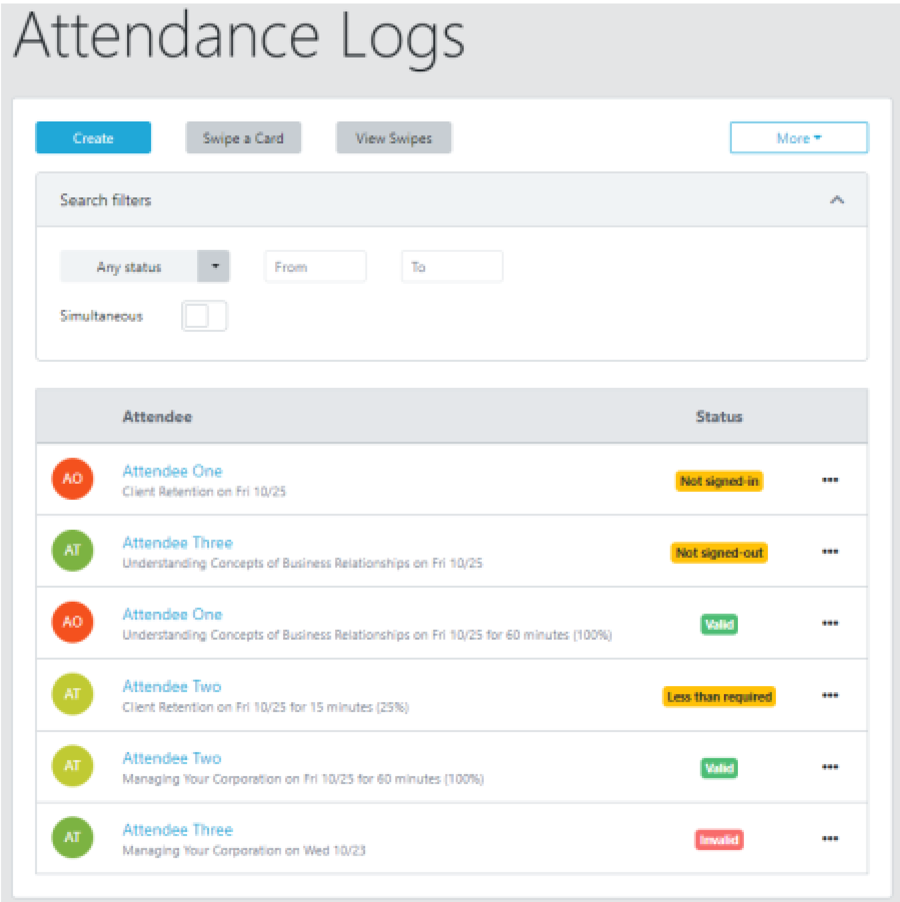
Conference Tracker app on the Google Play Store

Once you have downloaded and launched the app, you will be asked to log in. You will use the same information you use to access the Conference Tracker website. Once logged in, follow these steps in order to get you started scanning attendees in and out of sessions:

1. You will first be asked which room you are in. This is to ensure that it is loading the correct session.
2. Once you have picked your room, the Conference Tracker app will find the next upcoming session and allow you to begin scanning for it.
    1. If you have picked the wrong room or session, you can always switch to the correct one by pressing the Three Lines button on the top right corner of your app, and pressing on sessions. This will show you a list of available sessions you can choose from to begin scanning for.
3. Once you have ensured you are in the correct session, you will have two ways of scanning people in:
    1. **Scan** - by pressing the Scan icon, the Conference Tracker app will use your phone's camera to become a QR Code scanner. Before scanning a badge, ensure that you are in the correct mode. To do this, you will see an arrow towards the bottom of your screen. A green arrow pointing to the right will signify that they will be signed in of the session, while a red arrow pointing to the left will signify that they will be signed out of the session.
    2. **Manually** - If, for some reason, your Scanning is not working properly, you can always scan people in manually. You will need to enter their Card #, which will be located under the QR code on the attendee's badge. Once you have typed in the Card #, press the In button if the person is signing in, or the Out button if the person is signing out.
4. In order to save your data, you can press the Sync button on the home menu, which is located on the bottom right. The Sync button will upload all of your scanned attendees to the Conference Tracker server and it will download any new data from the Conference itself. Be sure to do this often so you don't miss out on any important changes!

Clean up Attendance Data

Once you begin to start scanning your attendees into sessions and the data begins to be uploaded to your Conference Tracker account, you may find some errors in that data. Maybe an attendee signed into a session but never signed out. Or maybe they didn't stay for the required amount of time in the session in order to receive credit. You might even have an attendee say that they did, in fact, attend a session, but you can't find their data anywhere! This is where the Manage Attendance section will come into play. Here, you can view all of your recorded attendance data and fully edit it to your needs.



To access this section, navigate to **Attendance** > **Manage Attendance** on the Navigation Bar on the right-hand side of your home page.

On this page, you'll be able to see every scan and log obtained from your conference. Scans refer to each individual scan that was performed by a Conference Tracker app. Logs will be the complete sign-in/sign-out log of an attendee to a session, which will calculate the amount of time they spent in the session as well. If there are any errors present with these, you will be able to find them on this page.

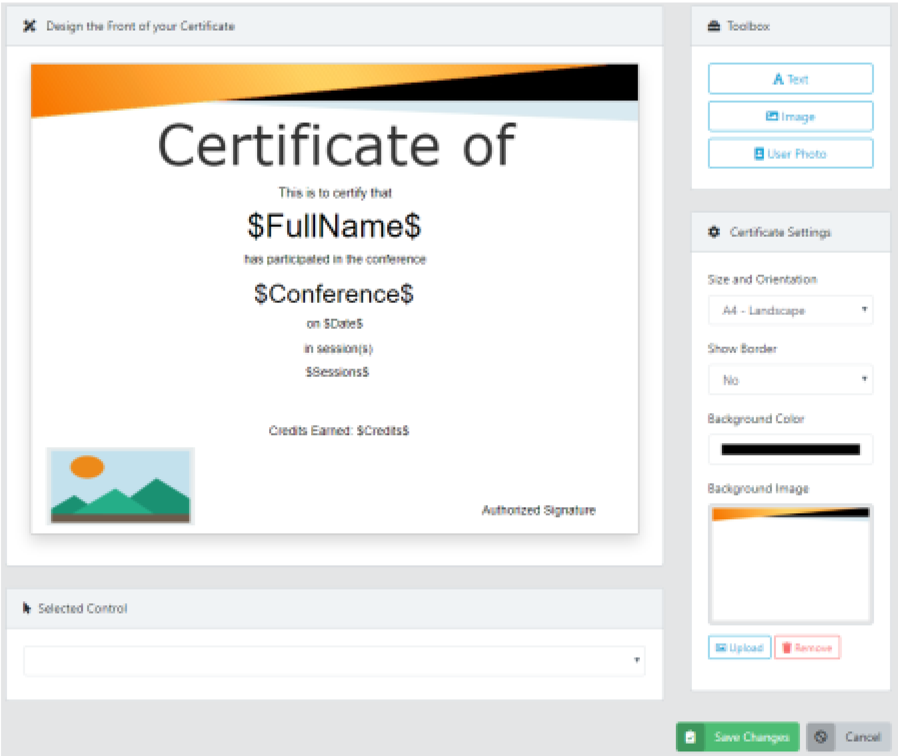
In order to fix these errors, you can click on the Fix Swipes or the Fix Logs buttons located under the More button on the upper right area of this section. These buttons will provide you with shortcuts and tools that will allow you to fix all errors encountered during your conference.

You can also fully create a log or a scan if you can't seem to find one that you are sure should be here. By clicking on the blue Create button on the top of this section, you will be able to create a brand new log, while clicking on the Create a Swipe button will allow you to create a brand new scan.

For help fixing these invalid logs/swipes, or more information creating them, click here. [Conference Tracker - Administrator Manual]

Design Attendance Certificates and CEU Transcripts

Once your conference has ended and your attendance has been reviewed, you can use Conference Tracker to create Attendance Certificates and CEU Transcripts. These will give your attendees proof that they have attended their workshops and earned their credits.



In order to get started with your certificate designs, go to **Certificates** > **Manage Certificates** to design the Attendance Certificate, or **CEU Report** > **Manage Reports** to design the CEU Transcript Certificate. Once here, click on the blue Create button towards the top of the section.

You can make multiple designs for both the attendance certificates and the CEU transcripts. They both share the same designer as the badge designer. The major difference between the two is that the CEU Transcripts can use a Table to present the classes and credits that the attendee earned. For more information on the certificate designer, click here. Certificates

Once you have completed a design, you can choose to either email or print them. These will be found under either the **Certificates** section or the **CEU Reports** section on the right-hand Navigation menu on your Conference Tracker home page. Once here, you will be able to choose who you would like to print/email certificates to. You can filter out by role, groups, date modified, or simply generate certificates for everyone.

For more information regarding certificates, please click here.

For more information regarding CEU transcripts, please click here.

Export Conference Data

At the conclusion of your event all of the data from your conference can be exported. This will allow you to retain all important information before the conference tracker expires 30 days after the conference. Simply browse the list of available exports to save them locally on your system. To access the data exports navigate over to ***Advanced Options → Export Data*** section of the main menu.

You are able to download your data as CSV , HTML or XLSX format.

Back to Admin Guides