Quick Start Guide to Conference Tracker V2

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Conference Tracker - Quick Start Guide

1. Set up Your Basic Conference Information & Time Zone

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

- **Title**: Complete with the name of your conference.
- **Subtitle**: Complete with a subtitle or slogan for your conference.
- **Conference Description**: Complete with a description for your conference.
- **Time Zone**: Complete with the proper time zone for your conference. Choose a US or an International Time Zone.
- **Conference Dates**: Complete with the start date and session dates for your set conference. The start date is used for date is used for calculating early bird, regular and on-site fees.
- **Location**: Complete with the conference street address.
- **Address**: Complete with the address of your venue.
- **Website**: Complete with your event website.
- **Session Tracks**: If you plan on using multiple trackers, enable this check box.

If you plan on using **Conference Tracker's** Attendee or Exhibitor Online Registration form, please check either the **Enable Attendee Online Registration** and/or **Enable Exhibitor Online Registration** to activate the functions.

Under **License Information**, if you plan to enable the attendee app, or leads app, check this box and we will send you more information on how to proceed with the new license.

Click the **Save Changes** button to save your input information.

2. Create Conference Sessions

To create the Conference Sessions, go to **Conference** > **Sessions**. Click the **Create** button to set up sessions in the conference.

To create a session, you must fill the following data:

- Click the **Create** button in **Conference** > **Sessions**.

Name and Description

- **Name**: Fill with the name of the session.
- **Description**: Complete with a description of your conference.

Date and Time

- **Start**: Select the start date and time of the session. (The available dates here are based on the dates inputted in **Basic Information**)
- **End**: Select the end date and time of the session. (The available rooms are based on the rooms created in the **View/Edit Sessions** menu)

Location

- **Location**: Enter room/ type to search for room and click on the specific one.

Fee and Registration

- **Fee**: Enter the fee for this session (if applicable).

Presenters

- **Presenters**: The presenter of the session. You may add multiple presenters. (Only users with the **Presenter** role will be able to be added here)

Attendance Tracking

- **Require Sign Out**: Check box if signing out will be required for this conference session.
- **Required Presence**: The percentage at which an attendee must be in a session to receive credit for it.
- **Credits**: The amount of credits given to each attendee for attending the session. You may use decimals here.

Click the **Save** button to save.

Rooms must be created manually adding sessions. Rooms are simply a name for the place the workshops will be taking place and can be created under **Conference** > **Sessions** and clicking the **Rooms** button. From here, you can enter the room name, and location of the room. If you are importing your sessions, rooms will be automatically created if the **Room** column is filled out.

3. Create/Import Attendees or Enable Online Registration

To input your attendees' data, go to **Manage Attendees** under the **Attendees** section on the homepage of Conference Tracker.

There are three ways to setup your attendees' data:

- Using **Import Data** in the **Advanced Option → Import Data** section. You'll be able to create a .CSV file to quickly upload your entire list of attendees into the Conference Tracker system. Click here to find out more about importing your data.
- Using manual entry: Go to **Attendees** > **Manage Attendees**. Click the **Create New** button

and complete the following box spaces:

- Under **General Information:**
  - **First Name**
  - **Middle Name**
  - **Last Name**
  - **Card Number**: To make changes to card numbers, or assign them to attendees.
  - **Email**
- Under **Security:**
  - **Password**: Enter password that the attendee will use to sign in.
  - **Roles**: Make sure the **Attendee** role is selected.
  - **Active**: Mark as active, if applicable.
- Under **Contact Information**, using manual entry, enter:
  - **Phone Number**
  - **Street Address**
  - **City**
  - **State**
  - **Zip Code**
  - **Company**
- Under **Title and Bio**, manually enter the attendees title and short bio about themselves, if applicable.
- Under **Photo**, a photo of the attendee can be uploaded.

Click the **Save Changes** button to finish adding your attendee.

- Under **Attendees → Online Registration**: Attendees will be able to register themselves through an online web form. Click here to find out more about using **Online Attendee Registration**.

You can make your own card numbers or use the **Assign Automatically** button to give all attendees without card numbers a card number.

4. Design Attendee Badges and Print

Design

To design your badges, go to **Badges** > **Manage Badges**. You'll be taken to a list of badge designs you've created. You can create multiple badge designs here. Click on **Create** to begin designing your badge.

If you'd like a full description on the functions of the badge designer, please click here.

Print

To print the badges. go to **Badges** > **Print**. In this page, you'll be able to download and print the badges either individually or all at once.

Steps to print individually:

- Go to **Badges** > **Print Badges**

- Under **Generate your badges**: From the created designs, select the design to use for the badges.
- To print all badges, select which criteria you want to print:
  - **All badges**: will print all.
  - **Only modified after last time badges have been printed**: will only print badges with different information from the last time they were printed.
  - **Only modified after a specific date**: Choose the date that you want information for the badges to have printed.
- To print individual attendee badges, click on **Specific badges** and enter the users name or email.
- Click on **Generate**.
- When the badge/badges are ready, click the **All Badges** link at the bottom of the page to view or download the PDF.

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. The Avery part number for badges that you need is #5392 and uses template number #74541. They are 3” x 4” badge inserts (6 to a page) and can be found at Avery.com by clicking here or at retailers carrying Avery products.

5. Record Attendance

You can turn an Apple or Android device into a powerful scanner to sign-in/sign-out attendees.

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

Here are some helpful guides to using the Conference Tracker app on your device:

Conference Tracker App Operator Manual

Conference Tracker App Operator Quick Start Guide

Conference Tracker App Administrator Advanced Options

6. Clean up Attendance Data

Go to **Attendance** > **Manage Attendance**

In this page, you'll be able to see all the logs from your conference. Each log will have the following data:

- The name of the attendee
- The workshop where the attendee has been checked.
- The date and the time of when the attendee signed in or out.

You can also create attendance logs by clicking on the **Create** button. You'll need to complete the following information:

- **Attendee**: The attendee whom the log is for.
- **Session**: The session that the log will be created for.
- **Date**: The date of the session
- **In/Out**: Choose the time and whether it is an In or Out time.

Attendance logs with the yellow yield icon next to them are **Invalid** logs. Attendees who have invalid logs will NOT obtain credit for the session that the log is invalid for.

For help fixing these invalid logs, check out the Conference Clean up Checklist.

7. Design Attendance Certificates and CEU Transcripts

To design your attendance certificate, go to **Certificates** > **Manage Certificates**. To design your CEU Transcripts, go to **CEU Report** > **Manage Reports**.

You can make multiple designs for both the attendance certificates and the CEU transcripts. They both share the same designer as the badge designer, and the only major difference between the two is that the CEU transcripts can use a Table to present the classes and credits that the attendee earned. There are also options to print or email your certificate/report.

For more information regarding certificates, please click here.

For more information regarding CEU transcripts, please click here.

8. Print Attendance Certificates or CEU Transcripts

To print the attendees certificates, go to **Certificates** > **Print**. In this page, you are able to download the certificates individually or all-at-once to print yourself.

Steps to print individually:

- Go to **Certificates** > **Print Certificates**
- Under **Specific certificates**:
- Select the certificate design you want to use using the drop down menu next to **Certificate Design**.
- Enter the attendee to create the specific certificate for.
- Click the **Generate** button.
- When the certificate is ready, the link at the bottom of the page to view or download the certificate PDF.

Steps to print all the certificates:

- Go to **Certificates** > **Print Certificates**
- Select the certificate design you want to use.
- Fill in values to create certain criteria which include:
  - Members of group
  - Users with roles
  - Users who attended a session
  - Exclude attendees with no credits earned
  - Only give credit to a session if the attendee completes its evaluation survey
- Click the **Generate** button.
- When the certificate is ready, the link at the bottom of the page to view or download the certificate PDF.

To print the CEU Transcripts, go to **CEU Report** > **Print Reports**. In this page, you are able to download the transcripts individually or all-at-once to print yourself.

Steps to print individually:

- Go to **CEU Report** > **Print Reports**
- Select the transcript design you want to use using the drop down menu next to **Transcript Design**.
- Scroll down to the **Specific transcripts** section and enter the names of the attendees you want print the transcripts for.
- Click the **Generate Transcripts** button.
- When the transcript is ready, click the **View Transcripts** link at the bottom of the page to download the transcript PDF.

Steps to print all the transcripts:

- Go to **CEU Report** > **Print Reports**
- Select the transcript design you want.
- Fill in values to create certain criteria which include:
  - Members of group
  - Users with roles
  - Users who attended a session
  - Exclude attendees with no credits earned
  - Only give credit to a session if the attendee completes its evaluation survey
  - Include certificate as first page
- Click the **Generate** button.
- When the transcript is ready, click the **View Transcripts** link at the bottom of the page to download the transcript PDF.

9. Broadcast Conference Certificates and Transcripts

To email certificates go to **Certificates** > **Email Certificates**. On this page, you are able to send the certificates individually or all-at-once.

To Send the Certificate individually follow these steps:

- Go to **Certificates** > **Email Certificates**.

- Select the certificate design you want to use using the drop down menu next to **Select your design**.
- For specific certificates, under the **Specific certificates** section, enter the names of the attendees you want print the certificates for.
- Click the **Generate** button and the certificates will be created pending a review before sending out.
- Verify the certificate design using the **Review the certificates before sending** section.
- In the section, **Write the email content**, you change the contents of the email message.
- Click **Email Certificates** to send the certificates.

To Send All of the Certificates follow these steps:

- Go to **Certificate** > **Email Certificates**, and make sure you are under the **All certificates** section.
- Select the certificate design you want to use..
- Fill in the appropriate content and click the **Generate all Certificates** button.
- You can verify the certificate design using the **Review the certificates before sending** section.
- Under **Write the email content** to change the contents of the email message.
- Click **Email Certificates** to send the certificates.

To email CEU transcripts, go to **CEU Report** > **Email Reports**. On this page, you'll be able to send the transcripts individually or all at once. You can also attach the attendance certificate with the CEU transcript.

To Send the report individually follow these steps:

- Go to **CEU Report** > **Email Reports**.
- Select the certificate design you want to use using the drop down menu next to **Select your design**.
- For specific reports, under the **Specific reports** section, enter the names of the attendees you want print the reports for.
- Click the **Generate** button and the reports will be created pending a review before sending out.
- Verify the report design using the **Review the reports before sending** section.
- In the section, **Write the email content**, you change the contents of the email message.
- Click **Email Reports** to send the certificates.

To send all of the Reports follow these steps:

- Go to **CEU Report** > **Email Reports**, and make sure you are under the **All reports** section.
- Select the report design you want to use..
- Fill in the appropriate content and click the **Generate all Reports** button.
- You can verify the certificate design using the **Review the reports before sending** section.
- Under **Write the email content** to change the contents of the email message.
- Click **Email Reports** to send the certificates.

10. Export Conference Data

To export your data, go to **Advanced Options** > **Export Data**. You are able to download your data as **.csv** , **HTML** or **Excel 2007/10** file. The data you are able to download is: **General Conference Data**

- Attendees
- Attendees incl. Reg Info
- Operators
- Presenters
- Exhibitor Representatives
- Exhibitor Representatives incl. Reg Info
- Exhibitor Administrators
- Exhibitor Administrators incl. Reg Info
- Sessions
- Leads
- Raw Swipes
- Attendance Logs
- Attendance Logs (with details)
- Check-Ins
- Check-Ins (with delivered handouts)
- Attendee Registrations
- Exhibitor Registrations
- Registration based Financial Report
- Sessions Registrations
- Session Evaluations
- Session Evaluation Comments
- Survey Summary Results
- Poll Summary Results
- Poll Text Responses
- # of Sign-Ins Per Session
- # of Attendees Per Session
- Leads App Users

Attendance Logs Report

- Download Grouped by Attendee

Social Media

- Images, videos and other files