Conference Tracker

Conference Tracking Made Easy©

www.engineerica.com

Engineerica

Conference Tracker – Reference Manual

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Introduction

Conference tracking made easy™

Be sure to check out more information on our website at www.engineerica.com/conferencetracker

A simple web-based conference tracking software solution to track your attendees attendance, manage members, and create ID badges & completion certificates. This can all be done in **3 easy steps!**

1. **Set up your conference.**
   - Easily upload your attendees data and customize your conference.
2. **Record attendance.**
   - Scan attendees' conference badges to record attendance.
3. **Get certificates & reports!**
   - Get attendance reports and email your customized certificates.

Benefits

Conference Tracker will **save you a lot of time and effort** by automating the attendance tracking and reporting process for your conference. This automated system **will increase the accuracy of your data**. Here are some of the benefits of this system:

- **Badge Designer:** Design your conference badge and easily print it for your attendees.
- **Quick Sign-in:** To record the attendance data simply scan the attendee badge using their Apple device camera. An optional barcode reader or magnetic stripe readers are also supported. Scanning a badge only takes seconds and is much faster than using pencil and paper to record attendance.
- **Quick reports:** Simply click a button to send the attendance data to the Conference Tracker web server on the Amazon Cloud. The data is transferred using your Wi-Fi or GSM Internet connection. Simply log in to your Conference Tracker account to view the attendance reports.
- **Global Accessibility:** You can sign in to the system and view the attendance reports from anywhere with just a web browser. This means you can view attendance reports remotely without having to be at the conference site.

- **Automatic Credit Calculations:** Let Conference Tracker calculate the Continuing Education Units (CEU) or Professional Development Credits each attendee earned for attending the conference sessions.

- **Attendance Certificates Designer:** Use Conference Tracker to create your own customized attendance certificates. Create the layout and text and add signatures and graphics. Conference Tracker will automatically add each attendee's name and attendance credits.

- **Easy Certificate Delivery:** You can print out the attendance certificates and pass them to attendees, or you can leave the delivery to Conference Tracker.

- **Convenient Communications:** Conference Tracker also includes a Messaging Center that allows you to send messages to attendees via email, SMS cell phone texting, or at sign in!

Conference Tracker Overview

Use **Conference Tracker** to **automate** attendance tracking for **conferences**, **seminars**, **workshops**, and **training sessions**.

Conference Tracker is web-based system hosted on the Amazon Cloud. To use it, **all you need is a web-browser!** There is **no need to buy hardware or install software**, and **access to the system is immediate and global**.

To track conference attendance, simply use the **free Conference Tracker app** on **Apple iPod touch**, **iPad** or **iPhone**. This app **converts your Apple device into a powerful attendance tracking device**. The attendance data is transmitted to the Conference Tracker server on the Amazon Cloud. Once there, simply log in to your Conference Tracker account with a web browser to view or print the attendance reports. If you like, you can also print out attendance certificates.

Use this website to learn more about **Conference Tracker**. For a **live demo** or for any questions on how **Conference Tracker can work for you**, please contact us.

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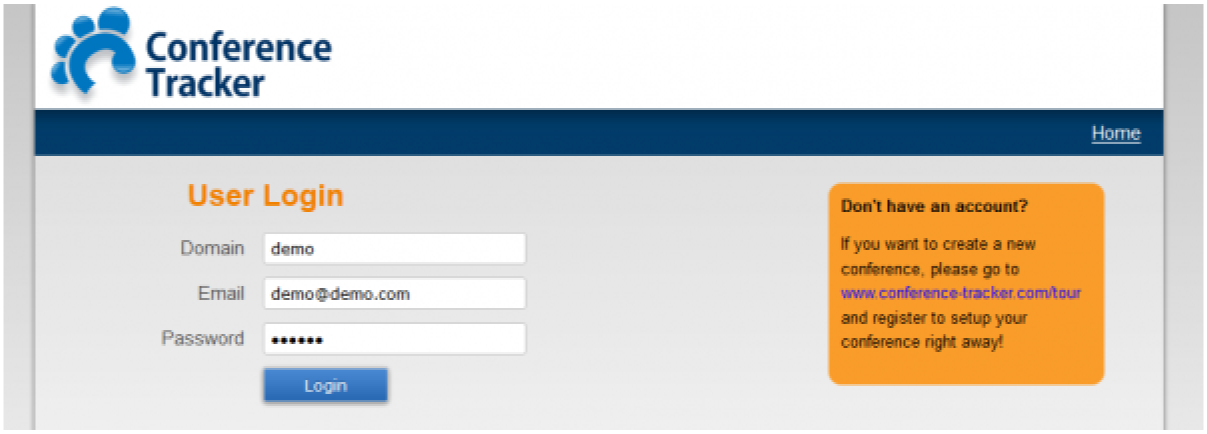
Getting Started

You can get started by accessing your **Conference Tracker** account by typing in http://www.conftrac.com/#Login in any web browser.



Once you get to the **Conference Tracker** website you will be prompted to Login.

You should enter your **domain**, **e-mail**, and **password** to login to the Conference Tracker service.

From here you will see the **Main menu**.

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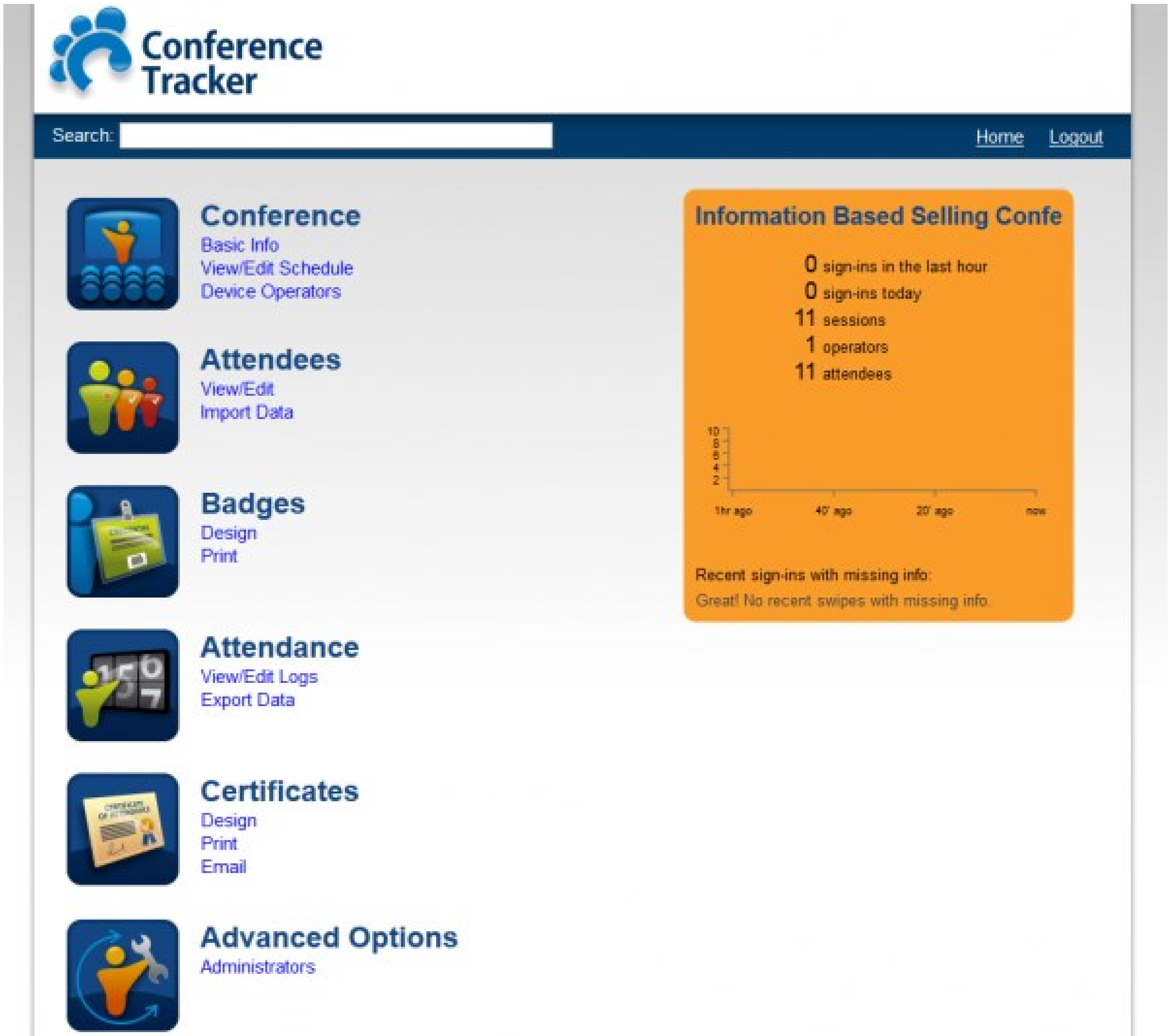

From this **Main Menu** you have Conference, Attendees, Badges, Attendance, Certificates, and Advanced Options. With each one of these options you can easily manage your conference. This guide will go through all of these options in detail to explain how to use the **Conference Tracker** service. If you ever get lost and want to go back to this **Main Menu** there is a **Home** link in the top right corner of every screen. Also you should notice the Orange block on the **Main Menu** that shows the current number of attendees over time.

Conference Settings

Conference displays when and where the conference is taking place. Also you can schedule the conference in the options. This section will also provide information on importing.

Basic Info

The **Basic Info** section allows you to enter the following:

- **Title:** Name of the Conference
- **Subtitle:** Reference name that the user can input for some reference.
- **Schedule:** Set dates and times that the conference is taking place.
- **Upload Logo:** Choose a file from your computer to use as this conferences logo.

Once you have set the previously mentioned information you must click the **Save** button for the changes to be set.

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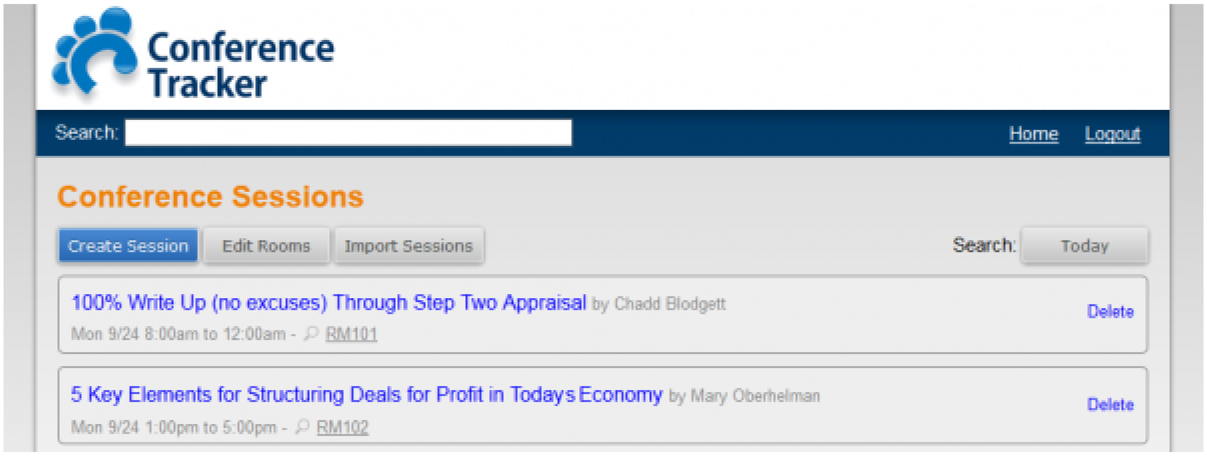
View/Edit Schedule (Conference Sessions)

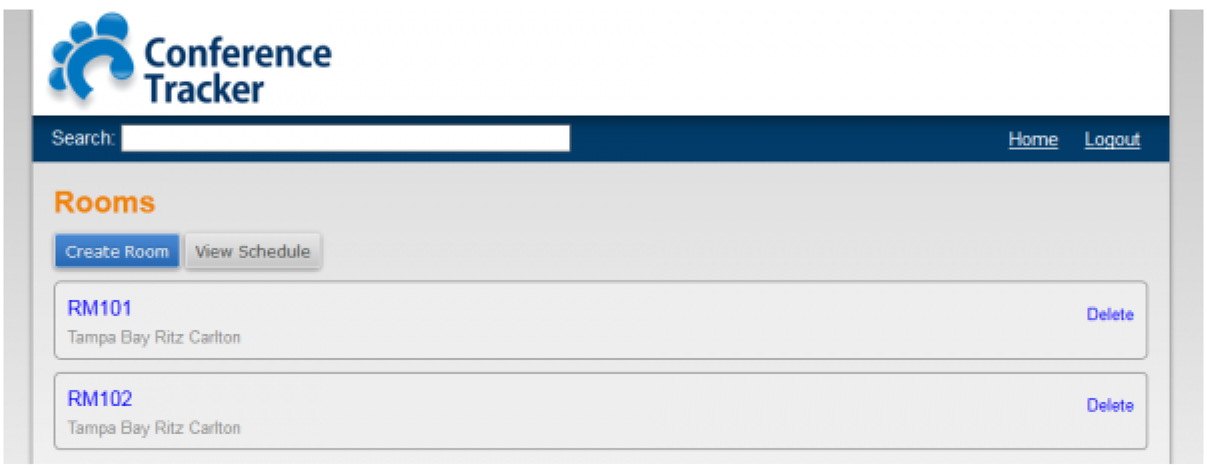
This is the section where you can create your workshops or sessions, add rooms, or even import your workshops or sessions.



You must create your rooms by clicking the **Edit Rooms** button prior to being able to import your sessions/workshops. If you do not, the import will fail every time.

Edit Rooms

From the Conference Sessions screen if you click on the **Edit Rooms** button this screen is where you can see a list of all the rooms you have created. If you have not started creating rooms this can be done by clicking on the **Create Room** button. The **View Schedule** button will take you back to the **Conference Sessions** screen.



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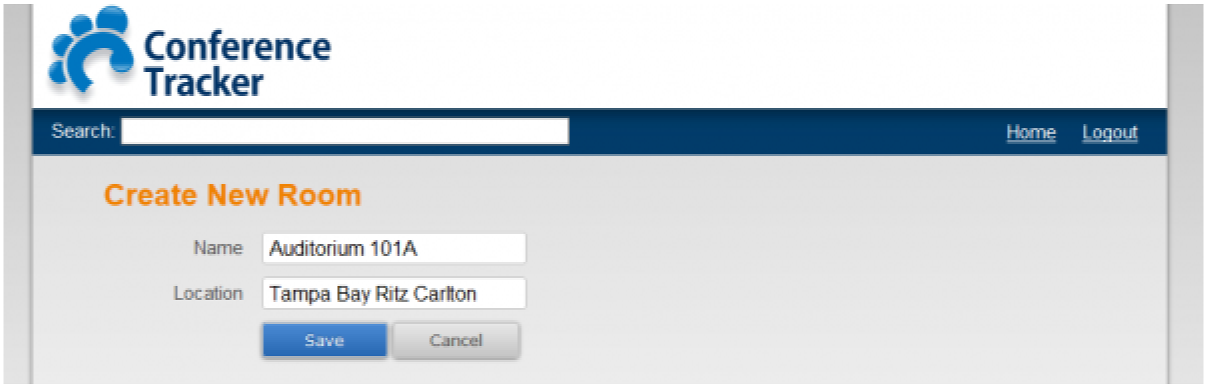
Create Room

By clicking on the **Create Room** button on the **Edit Rooms** screen, it will take you to this screen. To create a new room just fill in the **name** and **location** of the room.

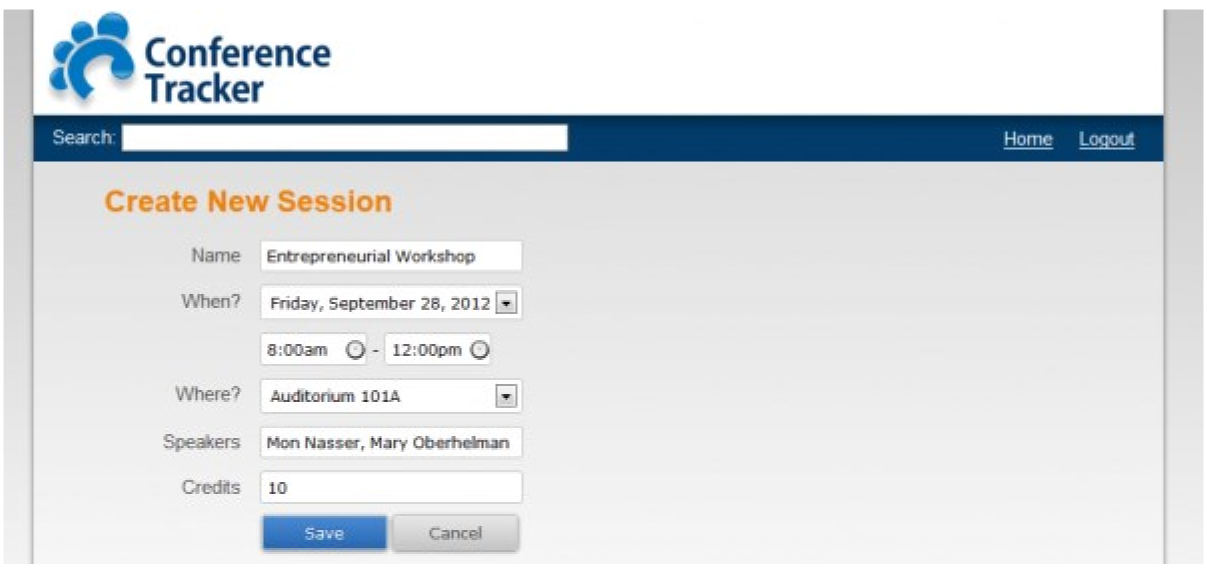


Import/Create Sessions

At this point once you have the rooms entered in the **Conference Tracker** system you are ready to either create your sessions/workshops manually or import them.

Create Session

To manually enter a session/workshop you click on the **Create Session** button from the **Conference Sessions** screen. Once you get to the Create Session form fill out the information for the **Name**, **When?**, **Time**, **Where?**, **Speakers**, and **Credits** fields. Once done, click save to create.



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Import Sessions

Here's the place where you can import your attendees, your workshops, and everything to quickly get started. To make it as simple as possible we have defined a bunch of formats to follow. By creating a file as explained below, you can directly upload the file and **Conference Tracker** will recognize it as valid one, knowing completely what to do.

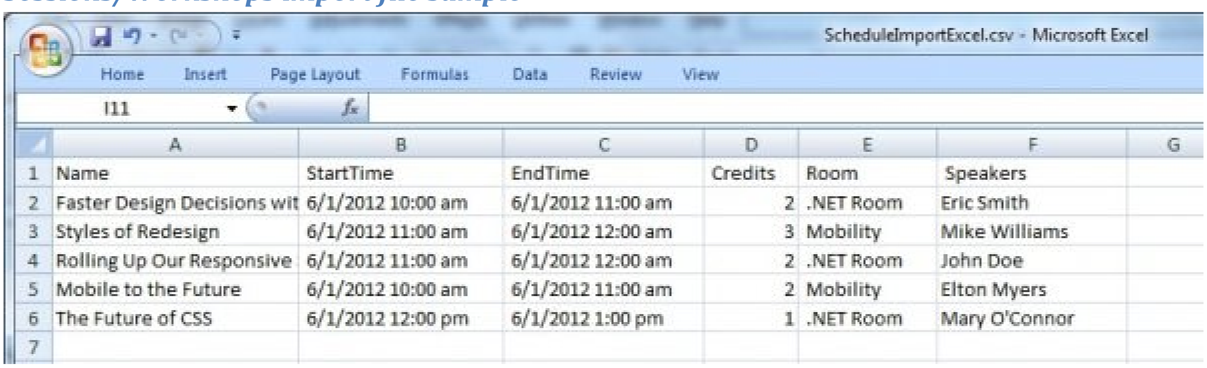
File Format

By now, only **comma-separated-values (CSV)** files are supported. This format is broadly supported by many application including Microsoft Excel; it also can be created using any simple text editor. In the first line of the file the headers must be included (check the list of valid headers below), then, the data must be included separating each column by a comma. In the case you need to write a comma in the data itself, you can prevent format errors by enclosing the full value in double quotes.

Valid Headers

To import **sessions/workshops**, you need to specify the following headers: **Name**, **Start Time**, **End Time**, **Credits**, **Room**, **Speakers**

Sessions/Workshops import file sample

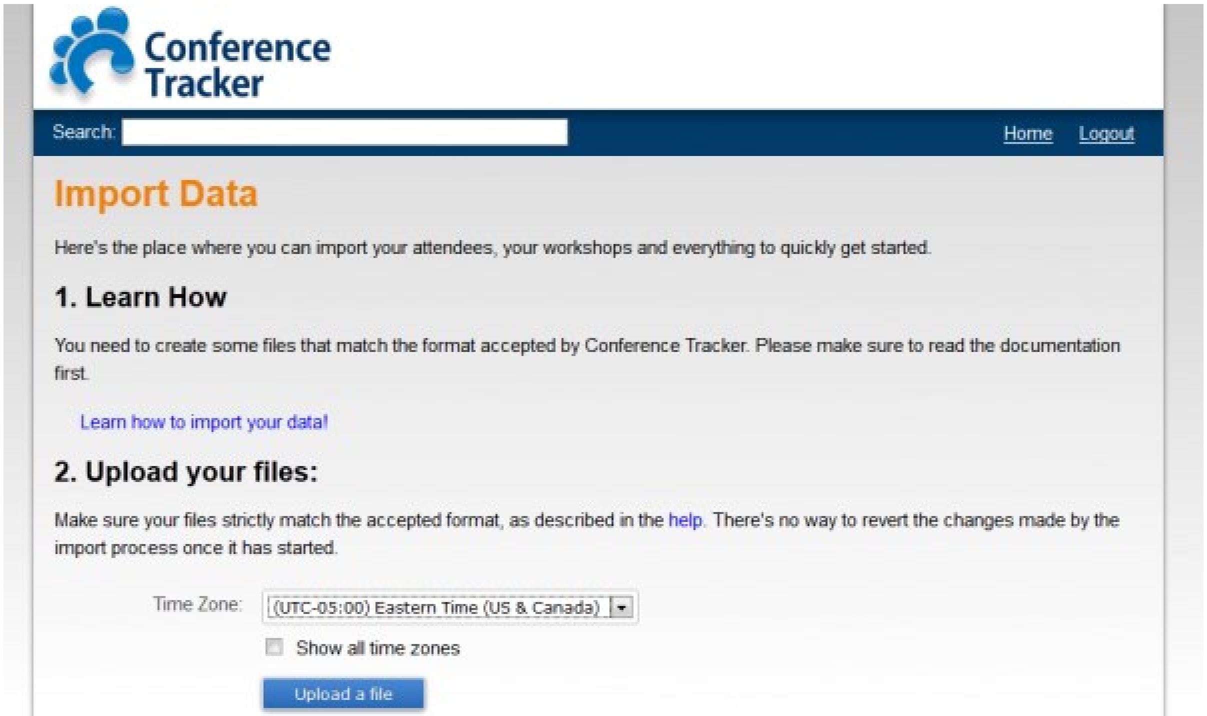


	A	B	C	D	E	F	G
1	Name	StartTime	EndTime	Credits	Room	Speakers	
2	Faster Design Decisions wit	6/1/2012 10:00 am	6/1/2012 11:00 am	2	.NET Room	Eric Smith	
3	Styles of Redesign	6/1/2012 11:00 am	6/1/2012 12:00 am	3	Mobility	Mike Williams	
4	Rolling Up Our Responsive	6/1/2012 11:00 am	6/1/2012 12:00 am	2	.NET Room	John Doe	
5	Mobile to the Future	6/1/2012 10:00 am	6/1/2012 11:00 am	2	Mobility	Elton Myers	
6	The Future of CSS	6/1/2012 12:00 pm	6/1/2012 1:00 pm	1	.NET Room	Mary O'Connor	
7							

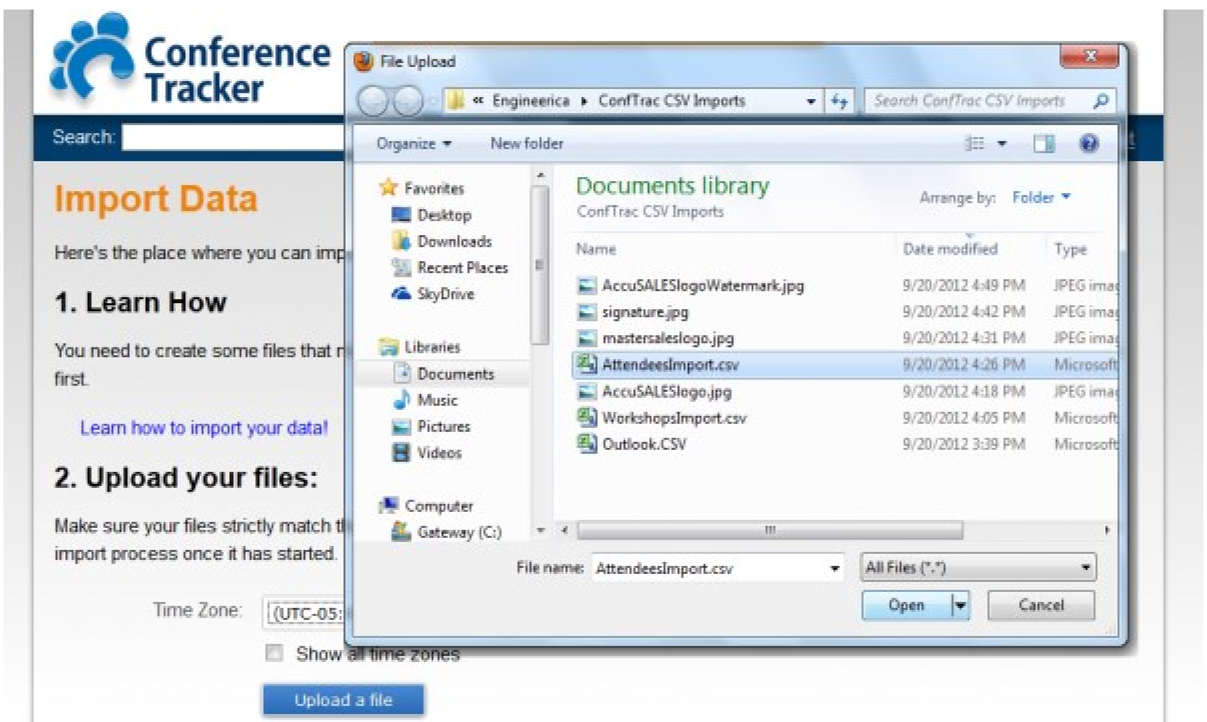
[Download the example file(.csv)]

Note that when you import the sessions it's important that you select the correct time zone. It has to match the data your uploading, which is not necessarily the time zone of the place where you currently are. E.g. you might be now in New York, but if the conference will take place in San Francisco, then you should select '(GMT-08:00) Pacific Time (US & Canada)'.

Once you've got the CSV files prepared and ready, let's move on to uploading your files. To get here just click on the **Import Sessions** button from the **Conference Sessions** screen.



To import the CSV files you created you just have to click the **upload a file** button.



Browse your PC to find the CSV files and click open to upload and done! A confirmation will be at the bottom of the screen.

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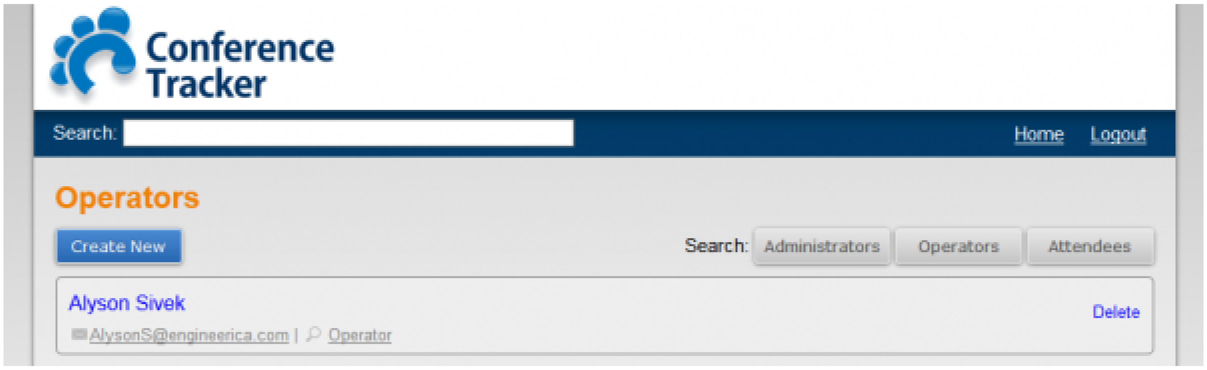
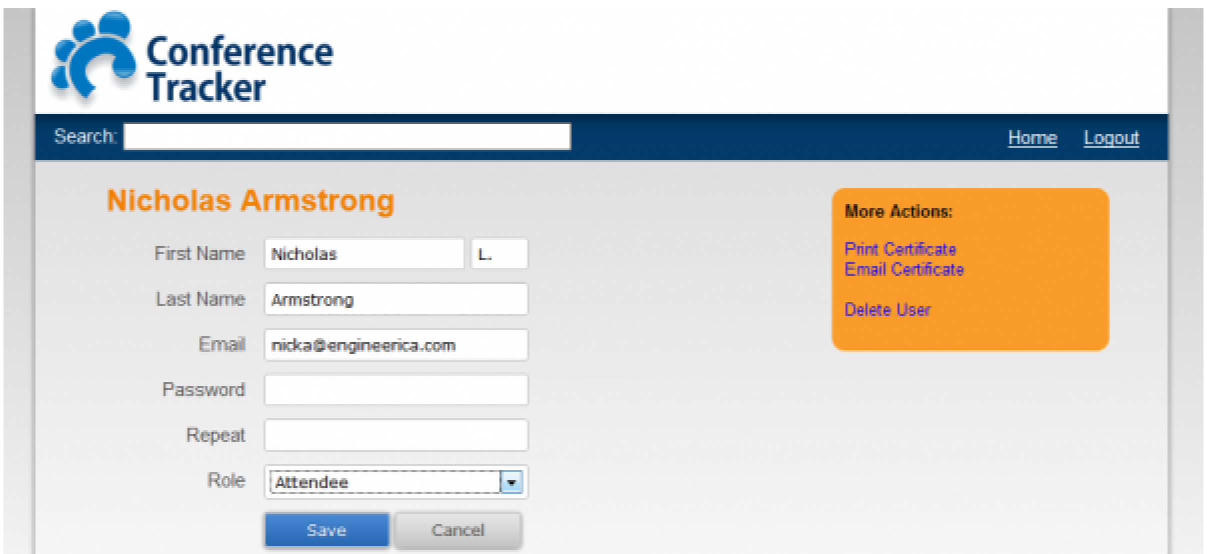
Device Operators

Click on View/Edit under Attendees and then click the Operators button. This is where you can create new users or quickly view/edit the users in the system. You can make them **Administrators**, **Operators**, **Exhibitors**, **Presenters**, or regular **Attendees**.



You can click on the **Administrators**, **Operators**, **Exhibitors**, **Presenters**, or **Attendees** buttons to show that group of users. Once you have selected the group you want to view just click on the name of a user you want to edit.



From this screen you can **change** the person's **First Name**, **Last Name**, **Email**, **Password**, **Repeat** (this is the password typed again), or **Role**. Most of the time you will visit this screen to manage the person's **Role** or **password** but you can enter corrections as well.

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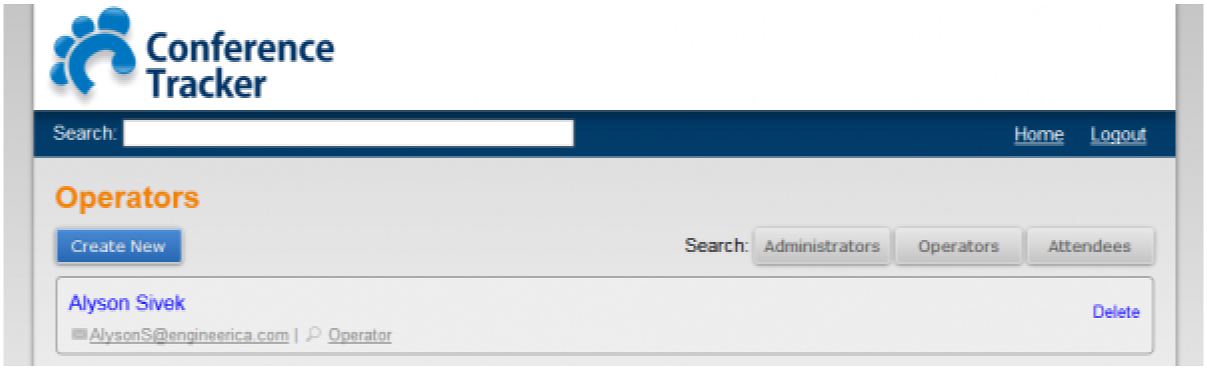
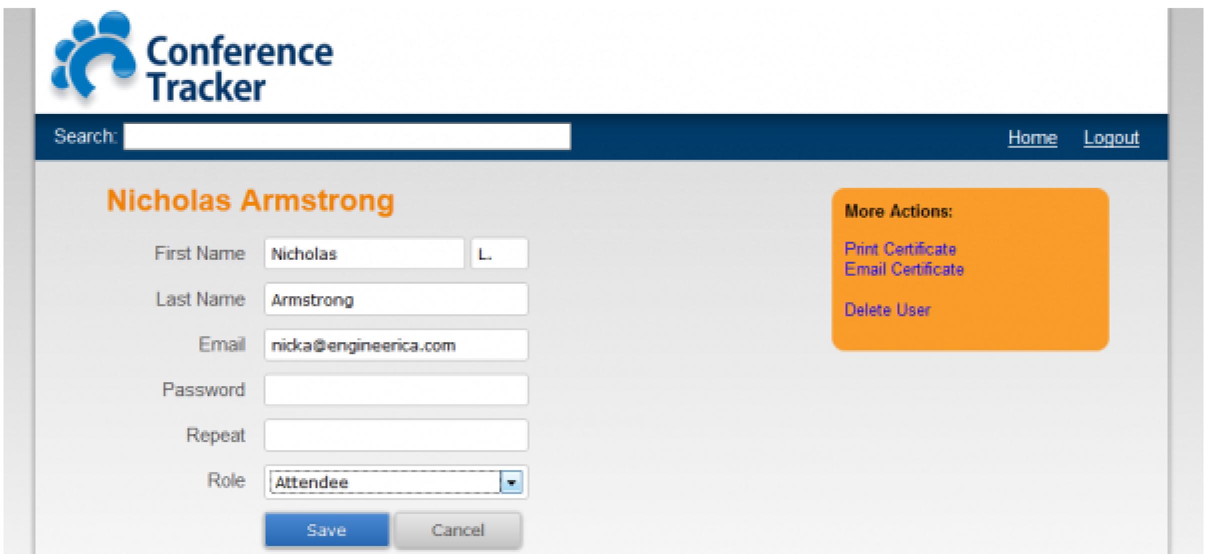
Presenters

Click on View/Edit under Attendees and then click the Operators button. This is where you can create new users or quickly view/edit the users in the system. You can make them **Administrators**, **Operators**, **Exhibitors**, **Presenters**, or regular **Attendees**.



You can click on the **Administrators**, **Operators**, **Exhibitors**, **Presenters**, or **Attendees** buttons to show that group of users. Once you have selected the group you want to view just click on the name of a user you want to edit.



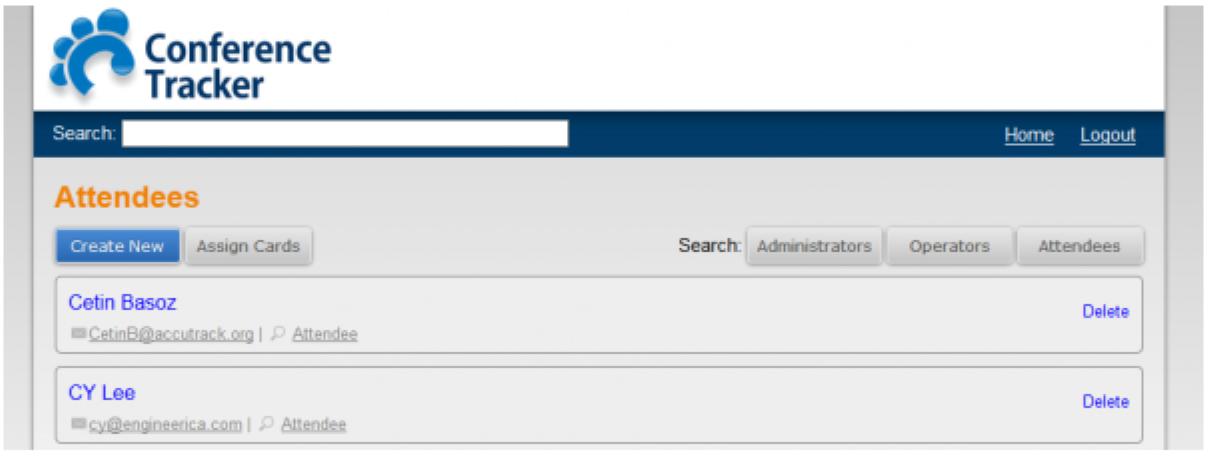
From this screen you can **change** the person's **First Name**, **Last Name**, **Email**, **Password**, **Repeat** (this is the password typed again), or **Role**. Most of the time you will visit this screen to manage the person's **Role** or **password** but you can enter corrections as well.

Attendees

This is where you can add, view, or edit your attendees and also assign cards to them.

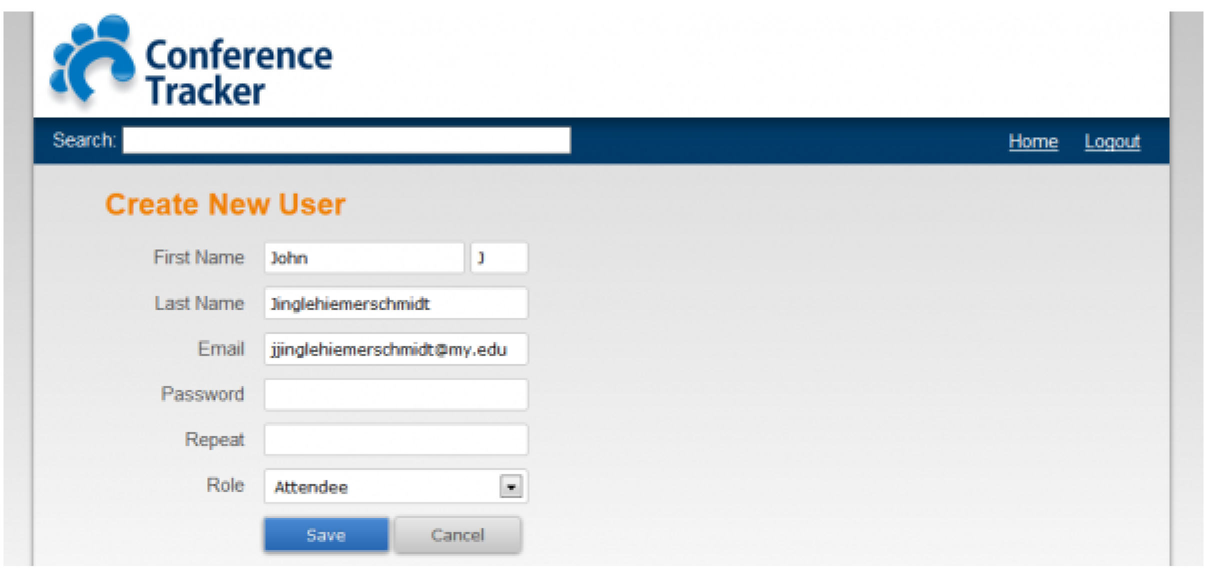
Search Filters

Search Filters allow you to see only certain attendees by role **Administrators**, **Operators**, and **Attendees** or by **Without Card**. These **Viewing Filters** are located in the top right corner of the screen.



Create New Attendee

You can manually create new attendees in case they show up unexpectedly and you need to add them or they were not on your imported list. You can access the Create New Attendee screen by clicking on the **Create New** button on the Attendees screen.



Once you have entered in the information you want to enter, press the **Save** button to create the Attendee.

Attendees can also be imported if you have a list of them with the minimum required information such as First Name, Last Name, and E-mail Address. Middle name and Card ID can be added as well. To see how to import attendees Click Here.

Import Attendees

Here's the place where you can import your attendees, your workshops, and everything to quickly get started. To make it as simple as possible we have defined a bunch of formats to follow. By creating a file as explained below, you can directly upload the file and **Conference Tracker** will recognize it as valid one, knowing completely what to do.

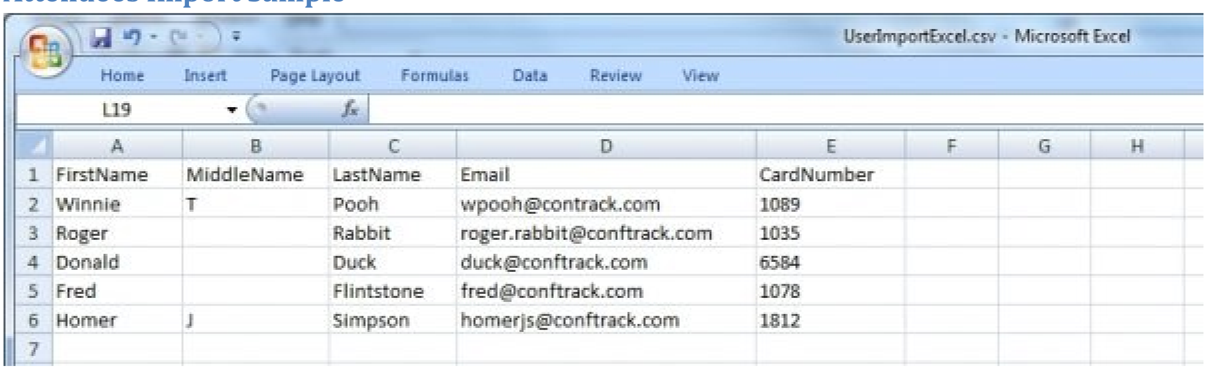
File Format

By now, only **comma-separated-values (CSV)** files are supported. This format is broadly supported by many applications including Microsoft Excel; it also can be created using any simple text editor. In the first line of the file the headers must be included (check the list of valid headers below), then, the data must be included separating each column by a comma. In the case you need to write a comma in the data itself, you can prevent format errors by enclosing the full value in double quotes.

Valid Headers

To import **attendees**, you need to specify the following headers: **First Name**, **Middle Name**, **Last Name**, **E-mail**, **Card Number** (This will be the number on the ID Badge Barcode)

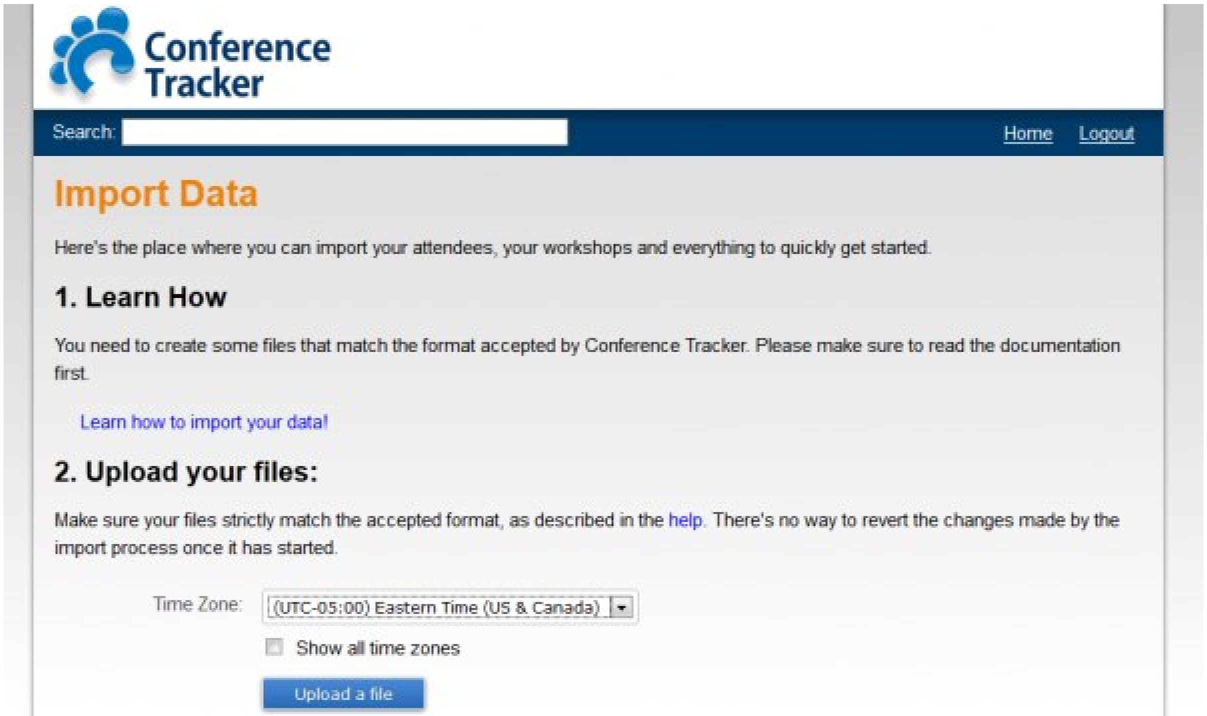
Attendees Import Sample



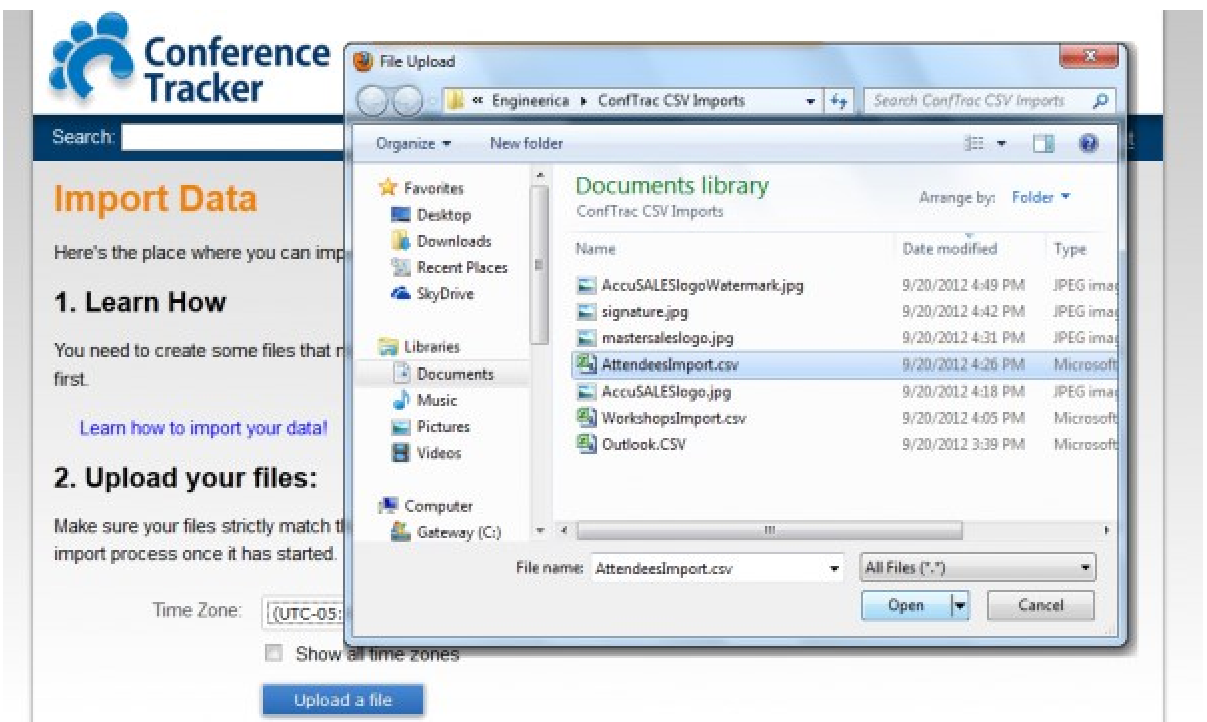
	A	B	C	D	E	F	G	H
1	FirstName	MiddleName	LastName	Email	CardNumber			
2	Winnie	T	Pooh	wpooh@contrack.com	1089			
3	Roger		Rabbit	roger.rabbit@conftrack.com	1035			
4	Donald		Duck	duck@conftrack.com	6584			
5	Fred		Flintstone	fred@conftrack.com	1078			
6	Homer	J	Simpson	homerjs@conftrack.com	1812			
7								

Download the example file(.csv)

Once you've got the CSV files prepared and ready, let's move on to uploading your files. To get here just click on the **Import Sessions** button from the **Conference Sessions** screen.



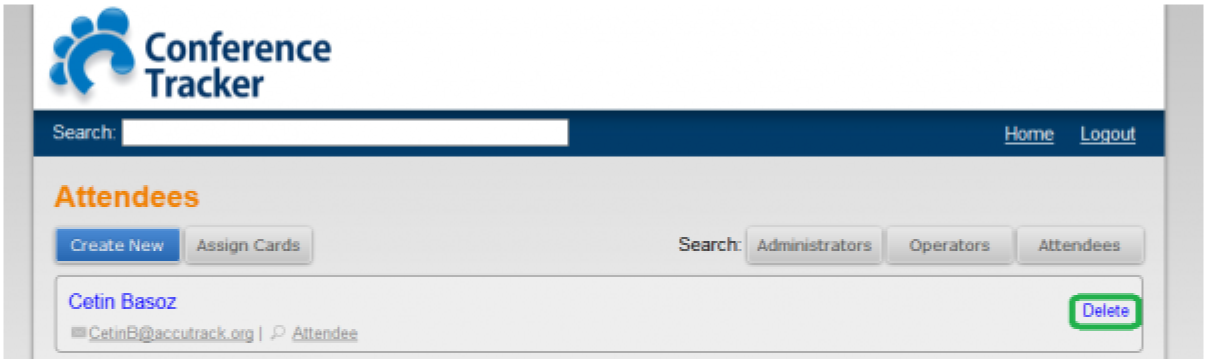
To import the CSV files you created you just have to click the **upload a file** button.



Browse your PC to find the CSV files and click open to upload and done! A confirmation will be at the bottom of the screen.

Delete Attendee

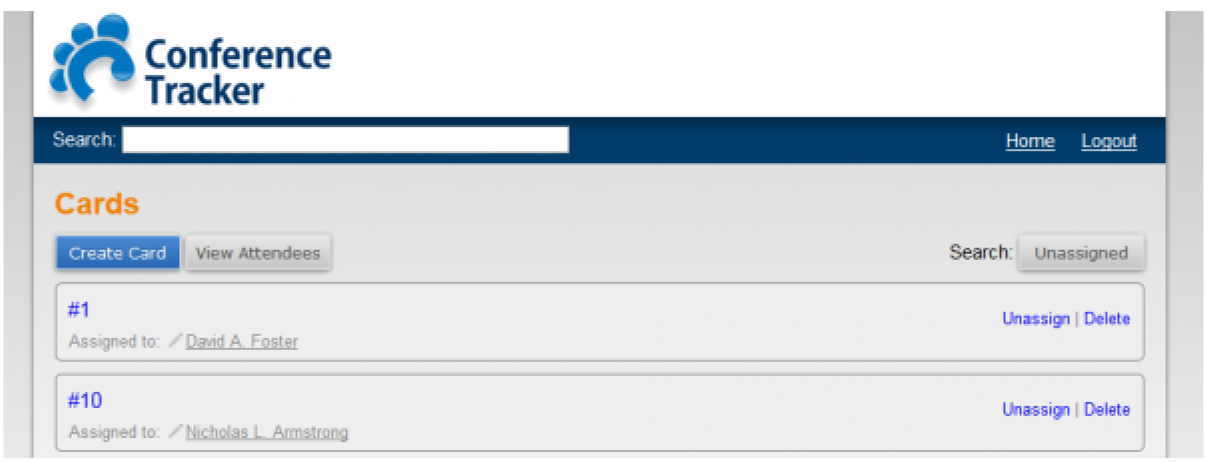
To delete an Attendee just click on the **delete** link at the end of their name in the list on the Attendees screen.



Warning! There is no confirmation screen with the delete option, so be sure you want to delete the Attendee before you click on delete.

Assign Cards

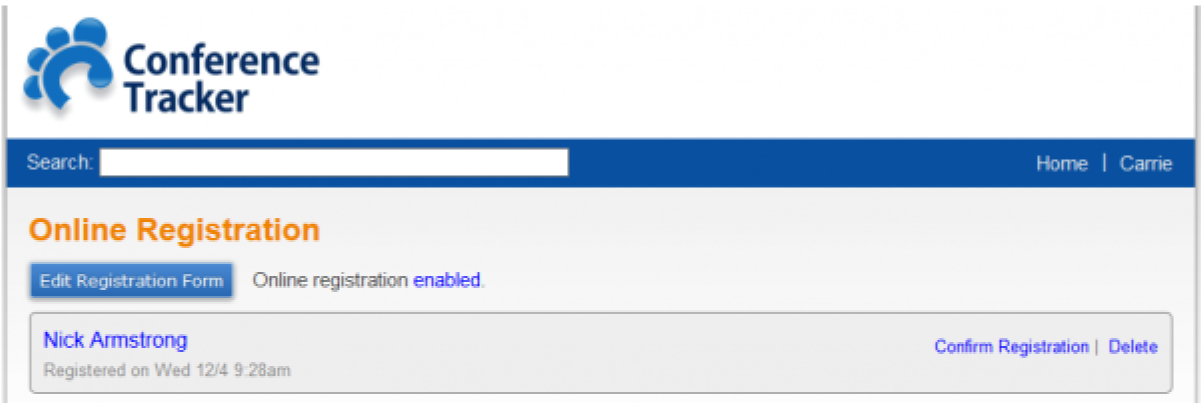
Cards are assigned to the attendees. To assign the card number you must create one clicking the **Create Card** button and type the name of the attendee you want to assign to the card. You can also use the **Viewing Filter** in the top right corner that says **"Unassigned"** to find the attendees you need to assign cards.



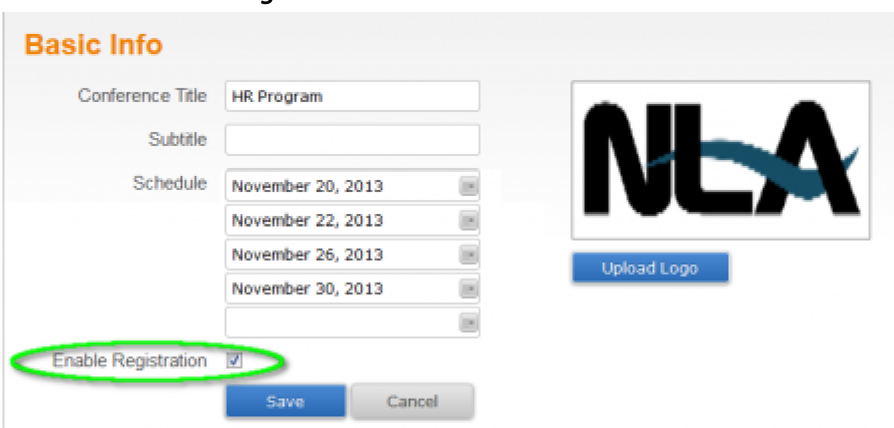
You only have to do this if you created the attendee manually. Importing users allows you to skip this step because they are assigned the cards automatically. In case the attendee shows up during the conference you will need to assign a card to them.

Online Registration

This is where you can create the registration form for the attendees to fill-out and also approve the attendees once they start completing the online registration form. Here is an example of a registered attendee who completed the online form:



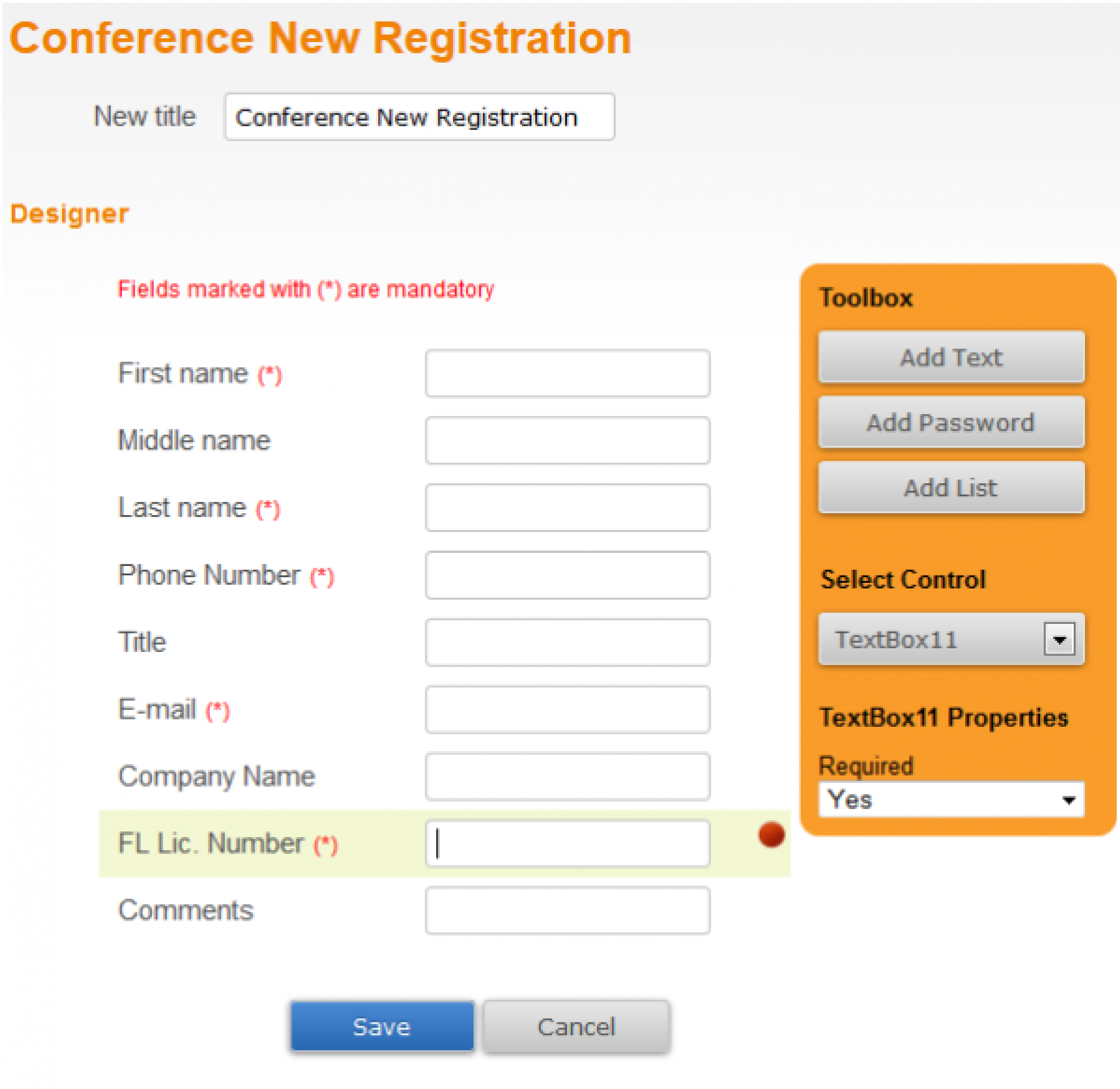
In order to use this feature you must first go to the **Basic Info** under the **Conference** section and check the box for ***Enable Registration*** and save.



If you have already enabled Online Registration you can now edit your registration form by clicking the **Edit Registration Form** button. Here you can add your own custom fields in addition to the default fields in the system. There are 3 types of fields:

- **Textbox**
- **Password** (Basically a text box that hides the characters)
- **Listbox**

To **add** them simply click the button on the far right to add each of the field types. To **edit** the text simply click the text to the left of the field. To **delete** a field click the red ball to the right of the field as shown below. Be sure to save after your are done with the **Save** button at the bottom of the form.

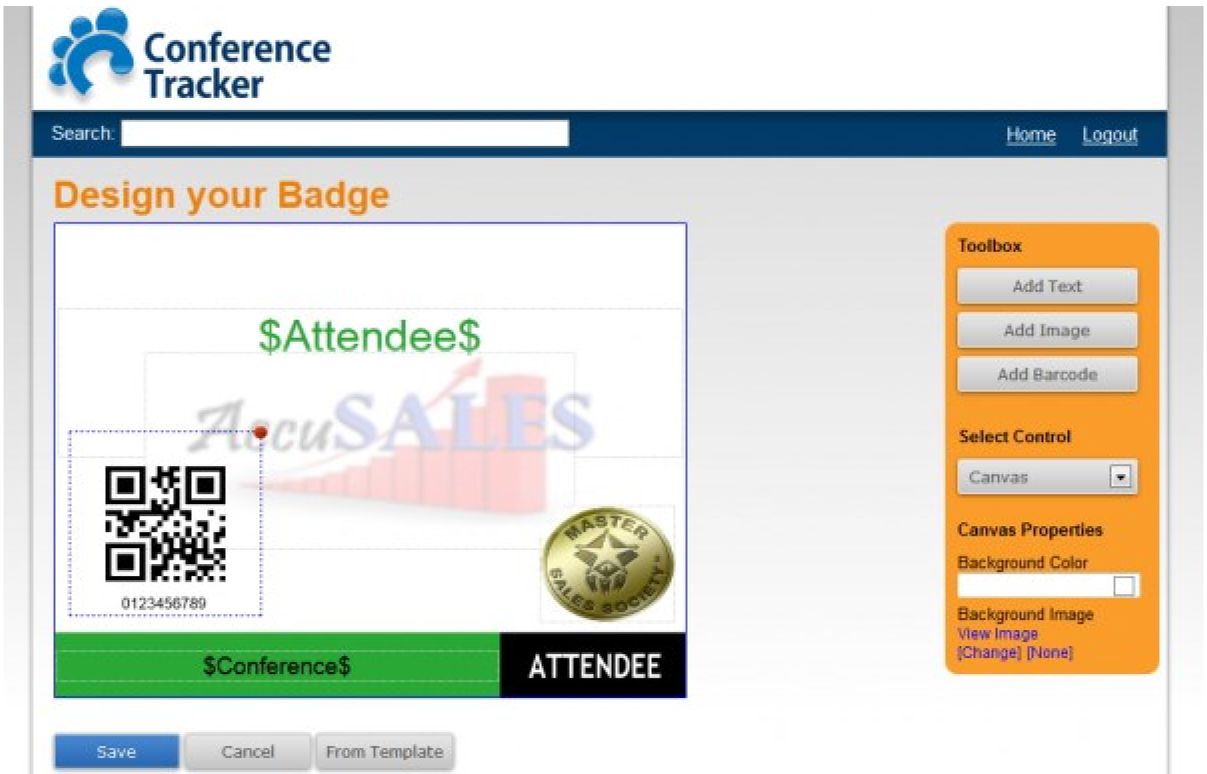


Badges

This is the section where you can design your own badge and print them out for your attendees.

Design

This is where you can fully customize your Attendees badges or just choose from several preset templates.



On this screen you can design the badges for your Attendees. Using the following sections:

- **Toolbox**
    - **Add Text:** Create a box where you can enter text.
    - **Add Image:** To add images to canvas the certificate.
    - **Add Barcode:** This allows you to add either QR or 39 barcodes to your badges.
    - **Select Control** This is used to select a part of the badge you want to edit. A dropdown list shows all the elements that make up your badge.
    - **Canvas Properties**
        - **Background Color:** Select the color you want your background. Click on the white box, and it will display a picture with all the colors you can change it.
        - **Background Image**
            - **View Image:** It will open a new window showing the image of the badge created.

- **Change:** You can upload an image that resides on your computer.
- **None:** Removes any background image upload.

Show changes in real time using coded keywords.

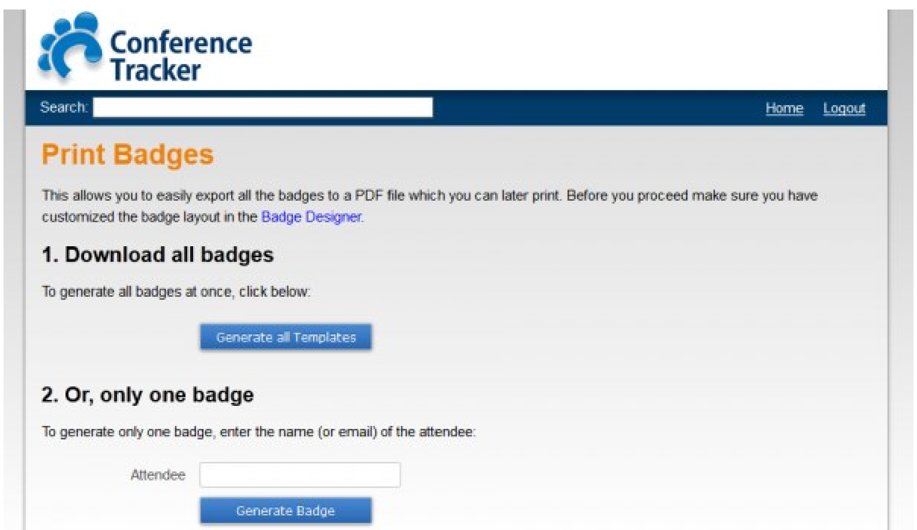
- **$FullName$** Displays the name of the Attendee.
- **$Conference$** Displays the name of the Conference.
- **$Date$** Display the date of the conference.
- **Additional Keywords:** $Title$, $Company$, $PhoneNumber$, $Email$, $City$, $State$

Print

As an administrator, you may want to directly download the badges to print out and hand out to the Attendees. You can download it individually or all.

- To print all badges click on Generate all badges under section **Download all badges** and wait until the bottom section of the screen with the message Your badges are ready, click on View badges to download.

- To print only a single badge click on Generate badge under section **Or, only one badge** and wait until the bottom section of the screen with the message Your badges are ready, click on View badges to download.



A confirmation screen will show at the bottom of the screen and click on **View Badges** to print out.

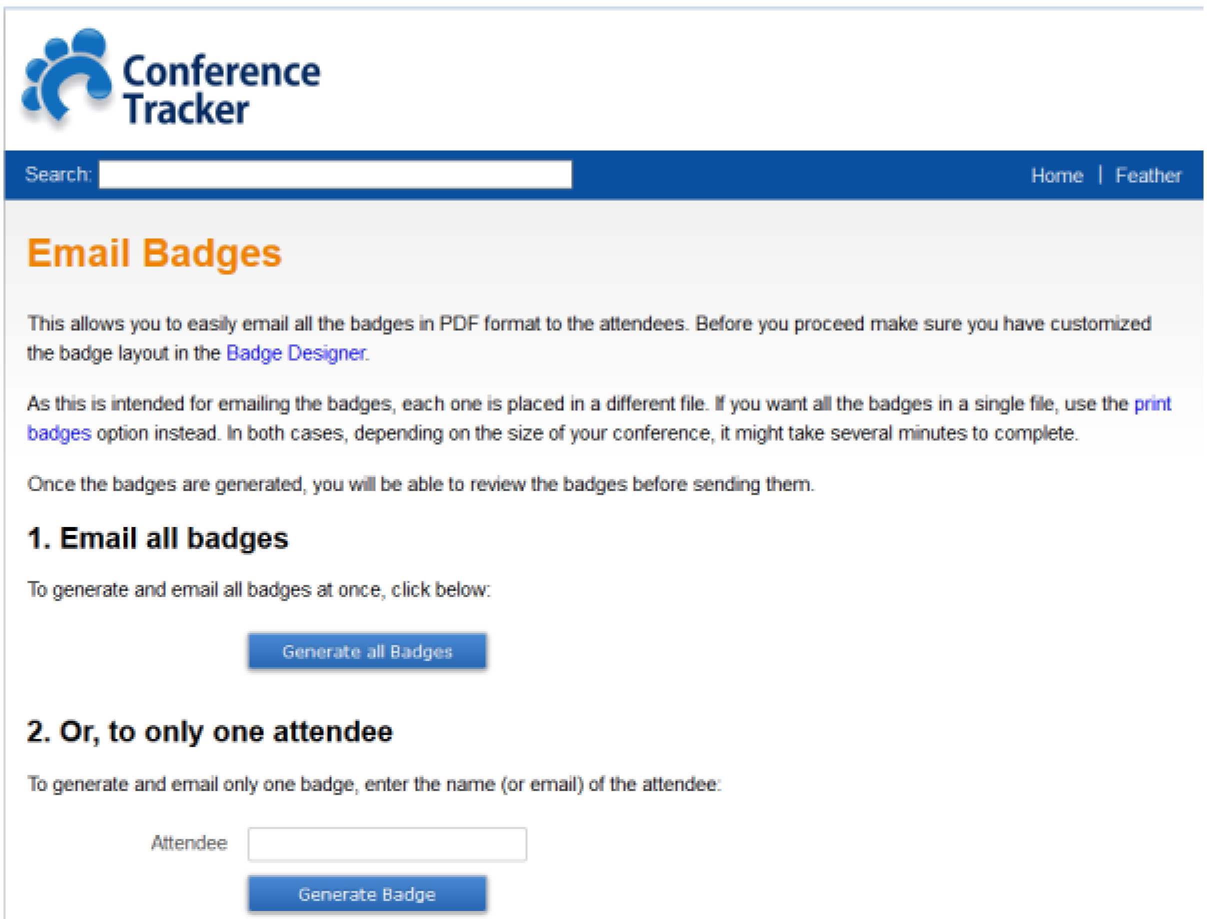
The Avery part number for badges that you need is is #5392 and uses template number #74541. They are 3” x 4” badge inserts (6 to a page) and can be found at Avery.com by clicking here or at retailers carrying Avery products.

Email

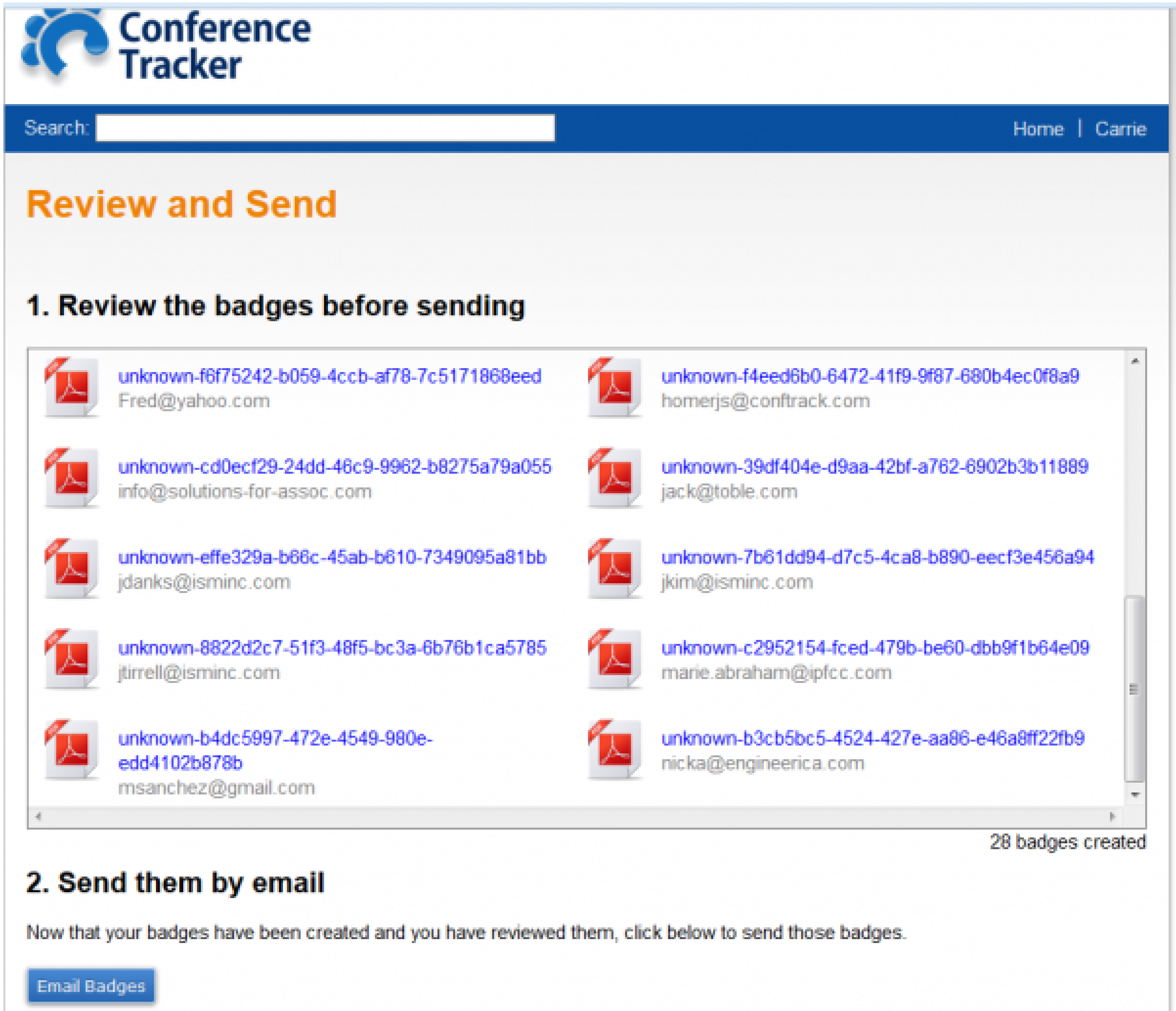
If you prefer to email the badges to the attendees you can email them individually or send the badges out all-at-once for the Attendee(s) to print. This may save you on some printing costs so you only have to print the badges that people forgot or misplaced at the conference.

- To email all badges click on Generate all badges under the section **Email all badges** and wait until the next “Review and Send” screen appears with the list showing all of your badges. At this point you can preview the individual badges you want to send out. Click on Email badges to send the badges to all Attendees.

- To email only a single badge click on Generate badge under the section **Or, to only one attendee** and wait until the next “Review and Send” screen appears with the list showing the individual's badges. At this point you can preview the individual badges you want to send out. Click on Email badges to send to the selected individuals.



Next you will get a screen to analyze the badges you selected before they are emailed to the attendees.



Finally click the **Email badges** button.

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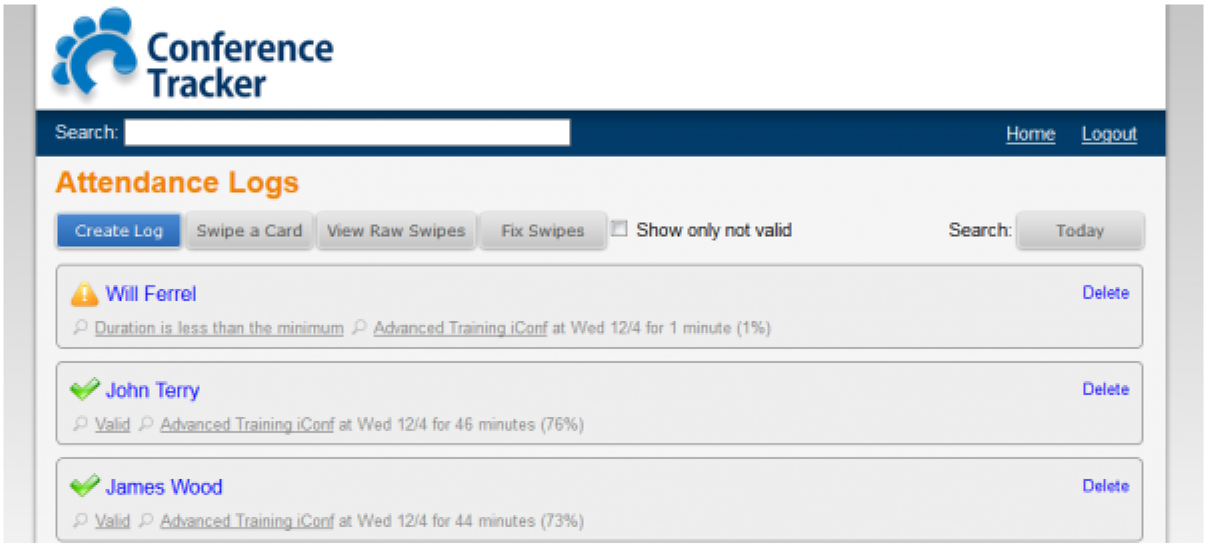
Attendance

This is where you can track where people are, what they are doing, and the Instructor they are with.

View/Edit Attendance Logs

In this screen you can see each attendee's sign-in log, also you can edit each part of the log as:



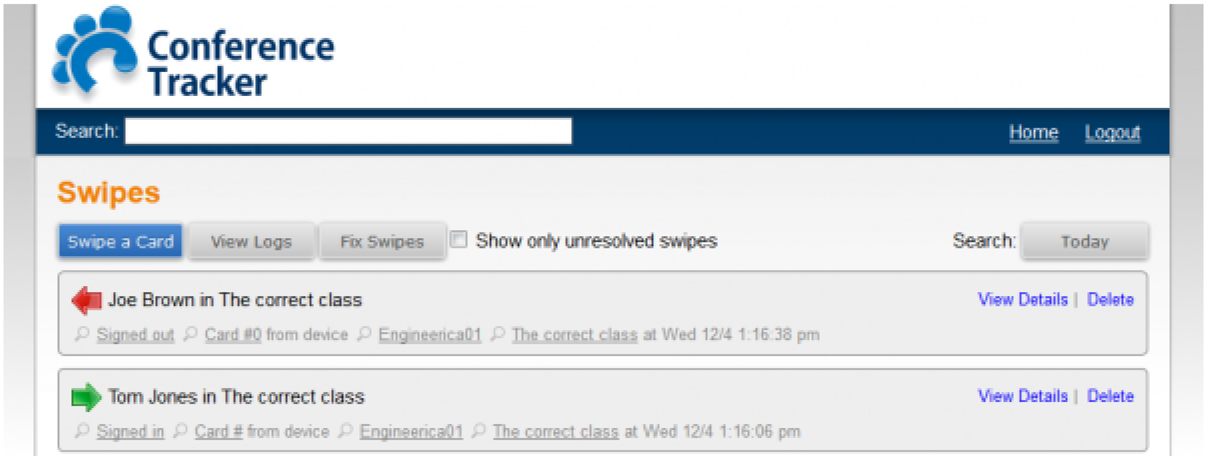
- **Attendee:** Displays the name of the attendee
- **Workshop:** Displays the session (workshop) where the attendee has sign in.
- **Sign-In Date:** Displays the date of the attended session.
- **Time:** Displays the time of the sign in.

Here you can click the **Create Log** button or the **Swipe a Card** button (barcode scanner needed) to **add** a log for an Attendee that may have not been able to swipe-in/out at a workshop. You can also **delete** logs that were from testing or unnecessary by clicking the delete option on the far right of the log. Finally you can click on the Name of the Attendee to **edit** or correct them. If you want to only see the logs needing correction place a check next to the "Show only not valid" checkbox. There are four types of invalid logs which include:

1. *Duration is less than minimum (This just means they were not there for the required %)*
2. *Not Signed-in*
3. *Not Signed-out*
4. *Multiple Swipes (Having 2 sign-ins, 2 sign-outs, or a sign-out before a sign-in, etc.)*

The other two buttons **View Raw Swipes** and **Fix Swipes** will be discussed in greater detail below.

View Raw Swipes

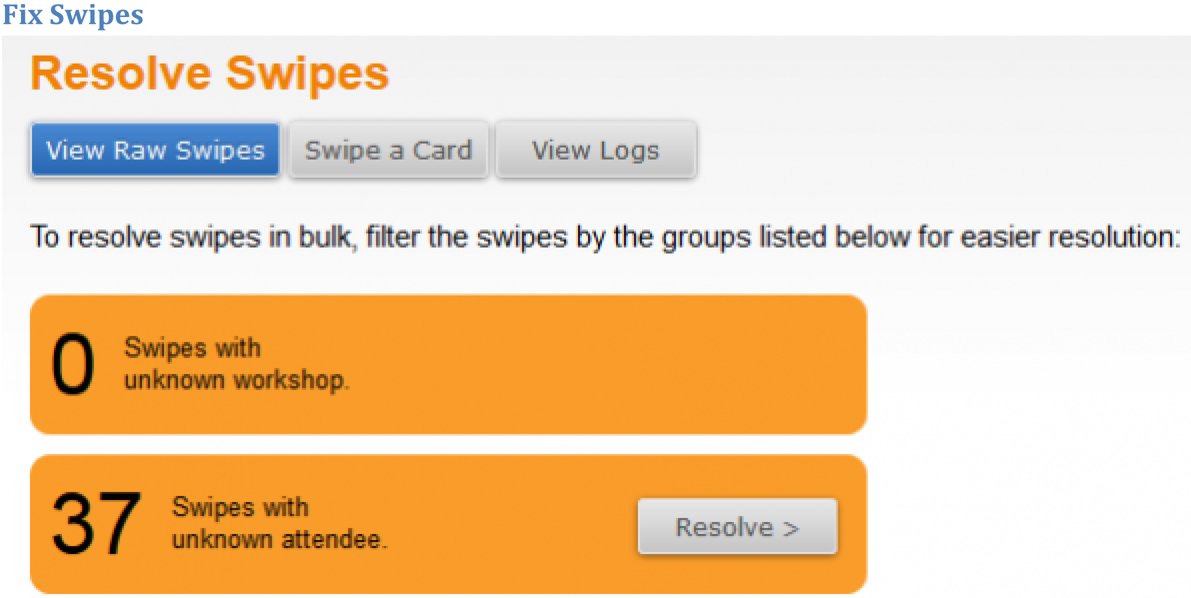


This screen displays the made swipes. A “Missing data” is displayed when an unknown attendee made a swipe in a workshop or a Room. You can place a check in the box next to **“Show only unresolved swipes”** to view all of the swipes that are “Missing data” or “Unresolved” at the moment. An operator can help by inputting comments while swiping in each Attendee. If they added some information to help resolve the swipe you can see the follow items:

- **When:** Displays the date ant time of the swipe.
- **Card#:** Displays the card number and the name of the attendee assigned to.
- **Room:** Display the room where the swipe was made.
- **Attendee:** Displays the name of the attendee.
- **Workshop:** Displays the session where the swipe was made. Also displays any operator comment.

If you want to go back to the **Attendance Logs** from this screen click the **View Logs** button.

Fix Swipes

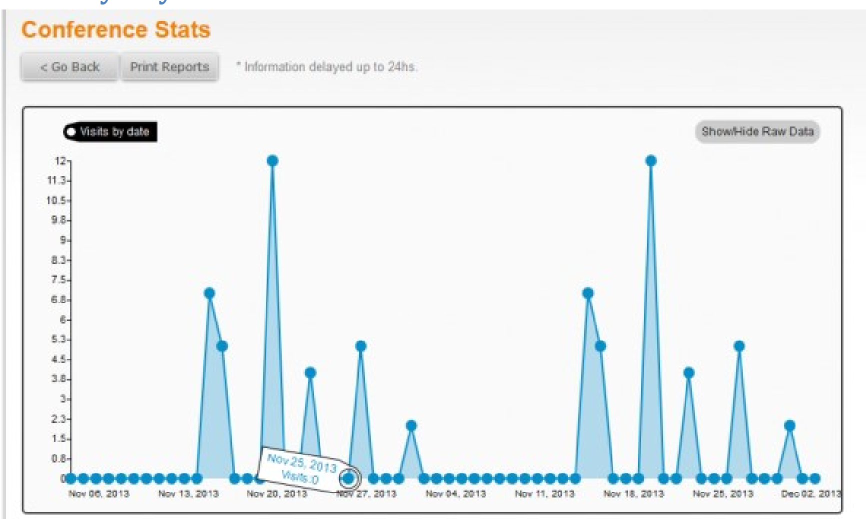


Conference Tracker – Reference Manual

Conference Analytics

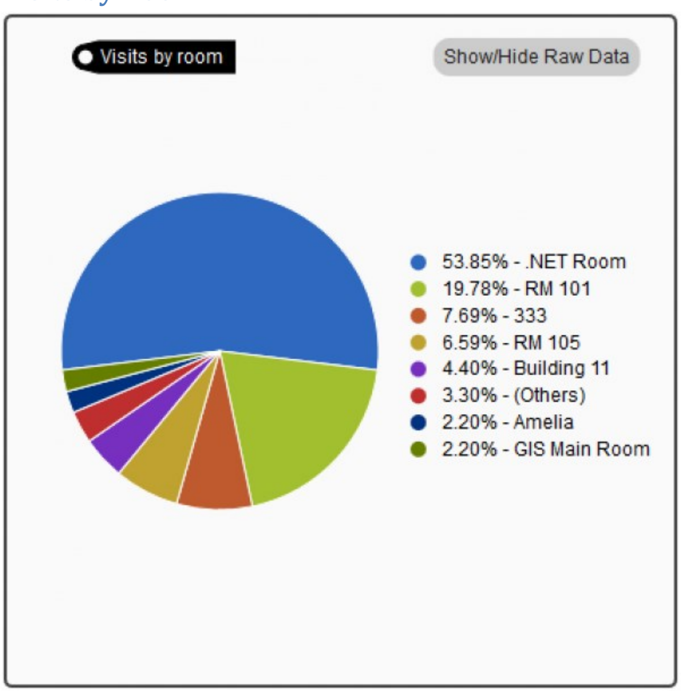
This is a great tool to analyze the effectiveness of your workshops based on the volume of Attendees participating in the workshops. This may also help to determine what days or times of the day during the conference were the busiest in order to staff more Operators or Administrators to help. This may also help when trying to balance the usage of the rooms during the conference. With this information you may notice that you have rented too many rooms or not enough.

Visits by Day



In this first chart you will see a line graph of the busiest days during your conference.

Visits by Room



This is a chart where you see a pie chart showing usage of the Rooms during your conference.

Top 50 Workshops

Top 50 Workshops

Session	# of Attendees
General Session Test	12
Dam Safety	9
Starwood Hotels	7
Required Session Test	6
AL Dept. Education	5
Florida Chiropractic Physician Association	5
Phi Kappa Psi Fraternity	5
Basic Workshop	4
Hawaii Foods	4
La Rural Water Association	4
Dealers United	3
International	3
Resume Writing	3
Verizon Training	3
Feathers Vegan Lecturre	2
GIS Intro Day 1	2
GIS Sign-In	2
Institute for Patient and Family Centered Care -	2
International Education	2
Learning iConf - The easy way	2
LERN	2
Shipping	2
Mobile to the Future	1
Training	1

In this chart you will see a list of the highest attended workshops during your conference.

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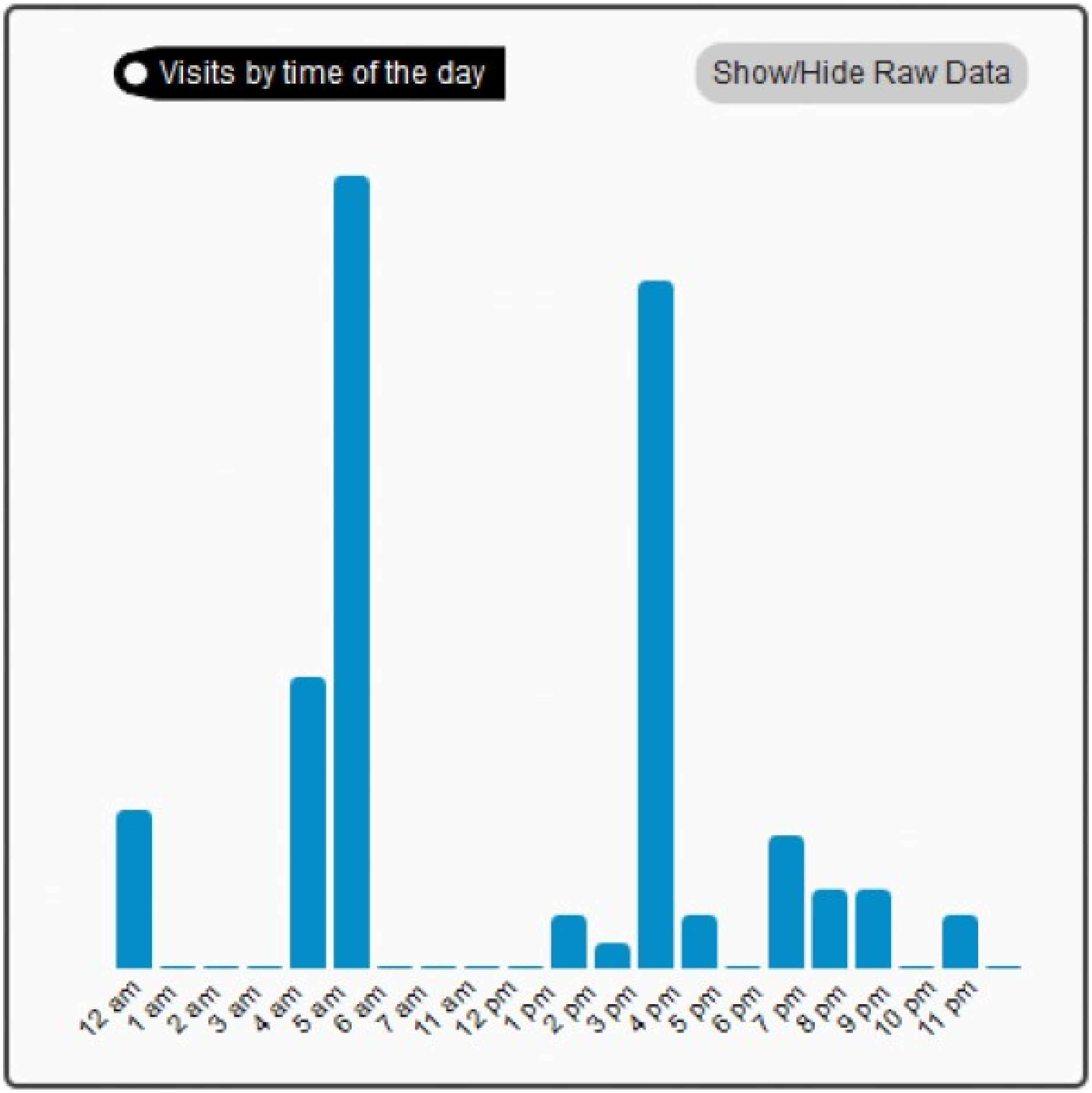
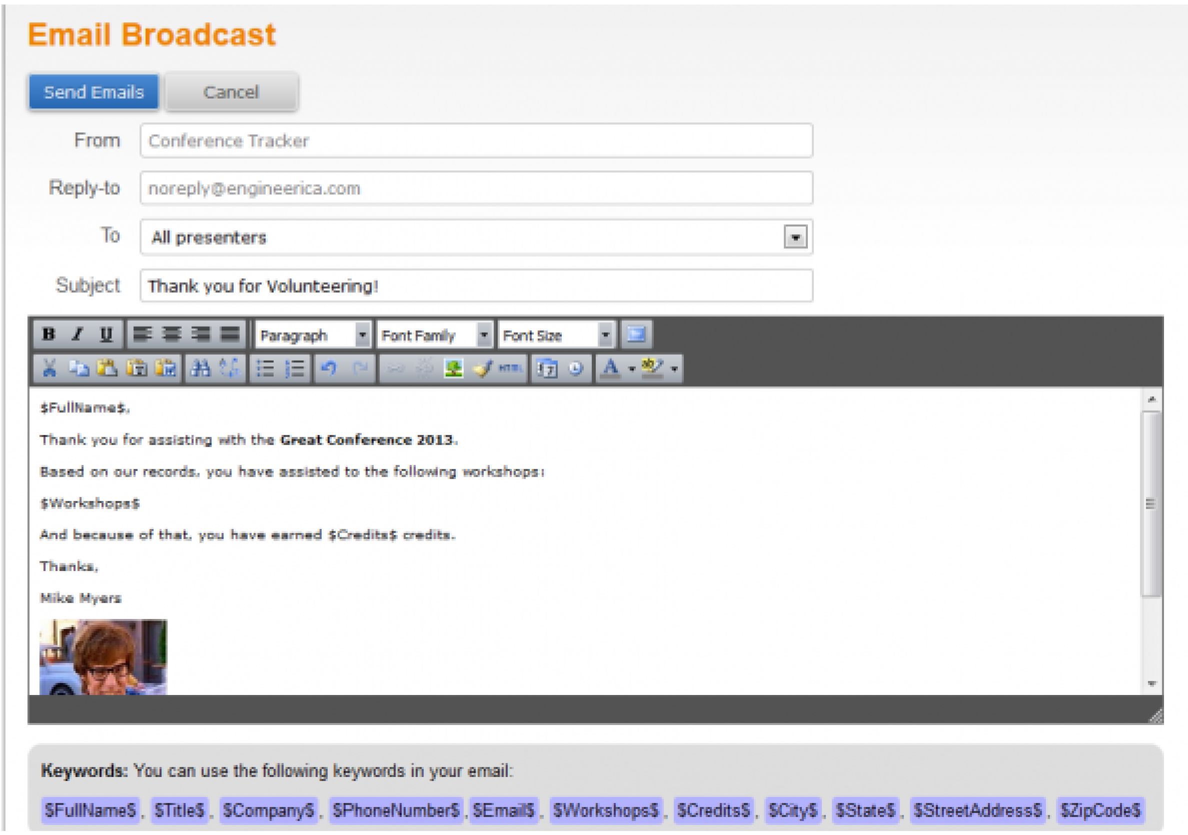
Visits by Time of Day



In this final chart you will see the busiest hours of the days during your conference.

Email Broadcast

This is a great new tool to communicate with any group of users from **Administrators**, **Exhibitors**, **Presenters**, and more! At the same instance you can e-mail just one specific attendee or even just a couple of them. Maybe you have received their registration but not their dues or deposit then simply write them an e-mail directly in Conference Tracker. As you can see from the e-mail below they are sending a message out to all Presenters thanking them for their help at the conference.



Just like in the Badge & Certificate Designers you can add Keywords to display the name of a Presenter, the workshops they attended, etc. This can all be done using Keywords such as:

- $FullName$
- $Title$
- $Company$
- $PhoneNumber$
- $Email$
- $Workshops$
- $Credits$
- $City$
- $State$
- $StreetAddress$
- $ZipCode$

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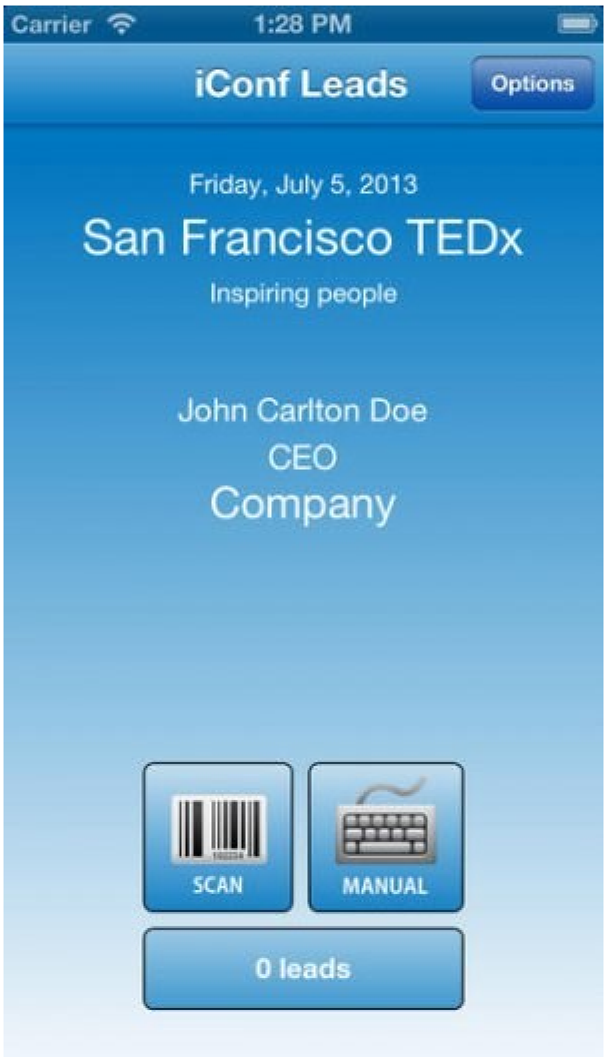
Lead Retrieval

This is the area where you can create, view, and edit the leads you have obtained during the conference.

Leads

In this section you will see all the leads you have tracked as an exhibitor or if you are an admin you will see all the leads tracked.

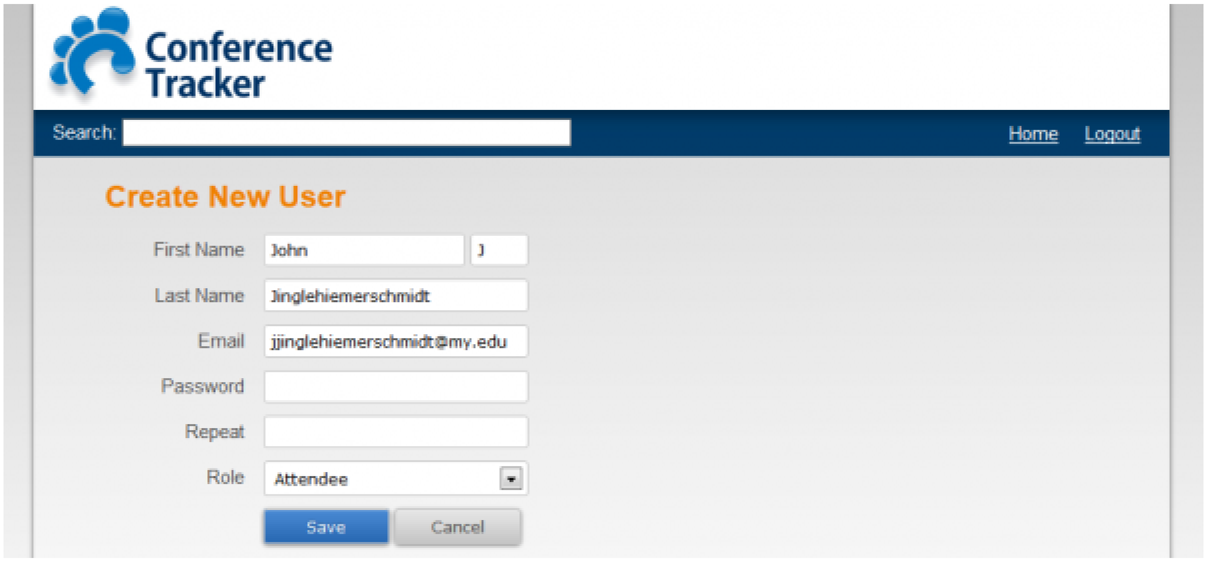
You must create an **Exhibitor** by clicking **Exhibitors** in **Lead Retrieval** section and then clicking the **Create New** button. While adding the exhibitor's Information it will ask you to fill in their first name, last name, e-mail, and to set their password. You'll also note their role is pre-set as an exhibitor.



Exhibitors can log onto **iConf Leads** [(Apple Store Download)]() with the credentials provided by a conference admin to start collecting leads. Once they have scanned the badges of Attendees the stored user information in conftrac.com will become available for them to retrieve after the conference. The Exhibitor may also quickly add notes to each scanned attendee to save for future reference. Using the same login credentials via http://conftrac.com will get them access to an export file of these leads and notes.

Exhibitors

You can manually create new exhibitors any time you want! Add them here if they were not on your imported Attendee list. You can access the Create New Exhibitor screen by clicking on the **Create New** button on the Exhibitors screen.



Once you have entered in the information at least the minimum information (first name, last name, e-mail and password), press the **Save** button to create the Exhibitor.

Exhibitors can also be imported if you have a list of them with the minimum required information such as First Name, Last Name, and E-mail Address. Middle name and Card ID can be added as well. To see how to import exhibitors Click Here.

Certificates

This is where you can design, print, and/or even e-mail certificates for the conference.

Design Your Certificate

This is where you can fully customize your Attendees certificates or just choose from several preset templates.

On this screen you can design the certificates for your Attendees. Using the following sections:

- **Toolbox**
    - **Add Text:** Create a box where you can enter text.
    - **Add Image:** To add images to canvas the certificate.
    - **Select Control** This is used to select a part of the certificates you want to edit. A drop-down list shows all the elements that make up your certificate.
    - **Canvas Properties**

- **Background Color:** Select the color you want your background. Click on the white box, and it will display a picture with all the colors you can change it.
- **Background Image**
  - **View Image:** It will open a new window showing the image of the certificate created.
  - **Change:** You can upload an image that resides on your computer.
  - **None:** Removes any background image upload.

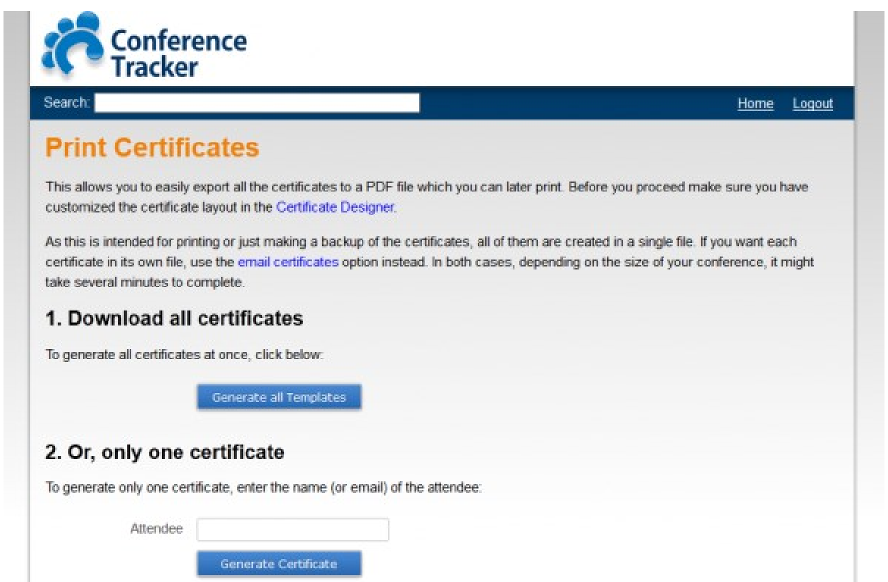
Show changes in real time using coded keywords.

- **$Attendee$:** Displays the name of the Attendee.
- **$Credits$:** Shows the number of credits the Attendee received.
- **$Conference$:** Displays the name of the Conference.
- **$Date$:** Display the date the certificate was earned.

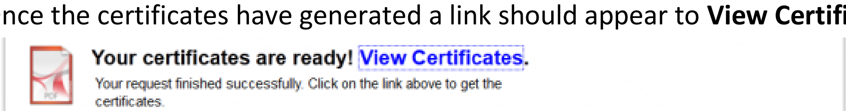
Print the Certificates

As an administrator, you may want to directly download the certificates to printout and handout to the Attendees. You can download it individually or all.

- To print all certificates click on Generate all Certificates under section Download all certificates and wait until the bottom section of the screen with the message your certificates are ready, click on View Certificates to download.
- To print only a single certificate click on Generate Certificate under section Or, only one certificate and wait until the bottom section of the screen with the message Your certificates are ready, click on View Certificates to download.



Once the certificates have generated a link should appear to **View Certificates**.



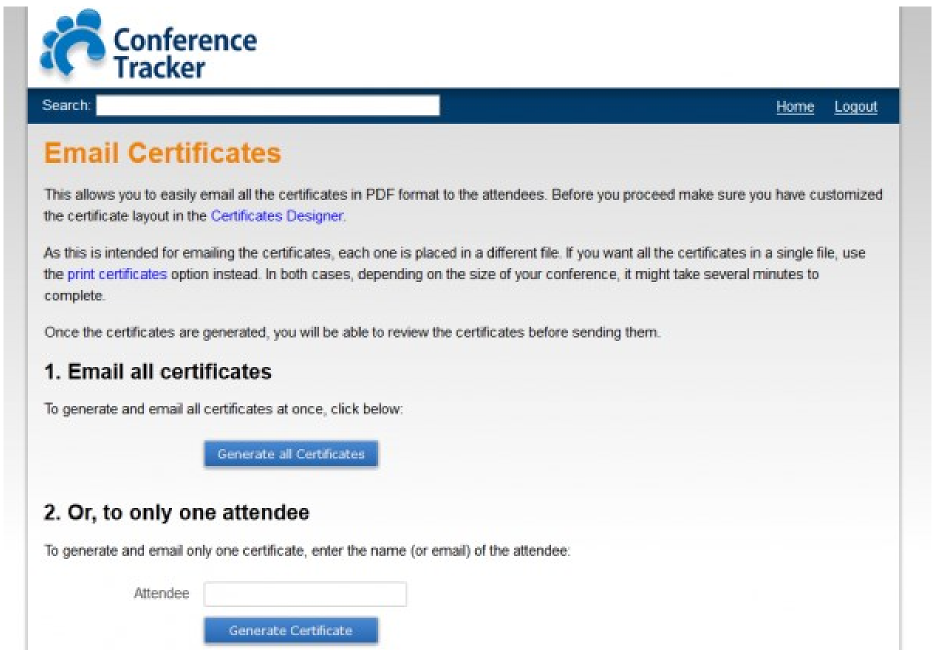
E-mail Certificates

You can send certificates via email to multiple or a single Attendee.

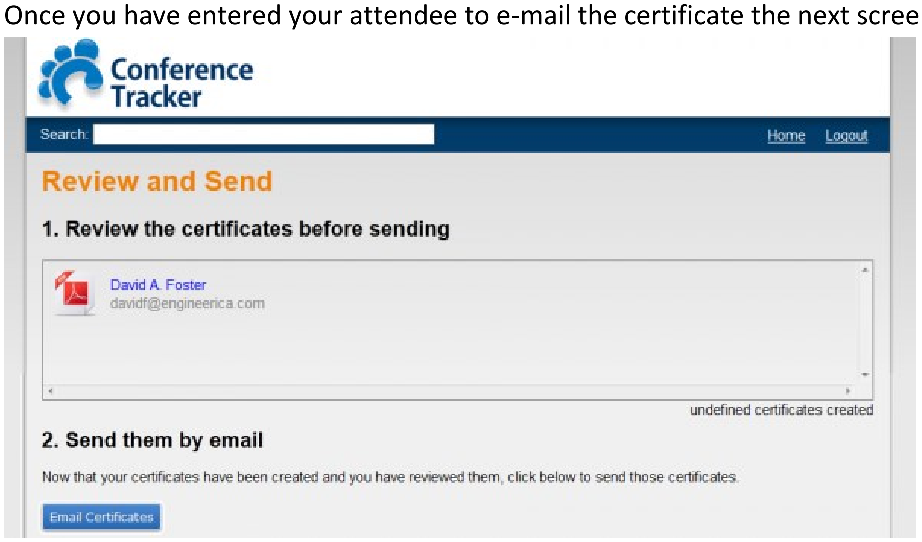
1. To e-mail all certificates, click on Generate all Certificates
2. To send to a single Attendee must type the name of the person. Then click on Generate Certificate.

For both forms to send the certificates you need to follow the final steps where you can review the certificate and send.

- If you need to verify the information on the certificate being sent is accurate, click on the attendee's name displayed on the review section before sending the certificates.
- Click on Email Certificate to send the certificate in section Send them by email.



Once you have entered your attendee to e-mail the certificate the next screen looks like this.



Once you hit **Email Certificates** the certificates will go out as is, so please review them.

Advanced Options

This section describes the available options in Conference-Tracker. To change the CT options, you need to click on *Settings*, below the *Advanced Options* section in the home page. After changing the options you want, click *Save* to apply the changes to your conference.

Import Data

This is where you go to import your data for the conference. At this point once you have the rooms entered in the **Conference Tracker** system you are ready to either import your Attendees/Workshops.

Here's the place where you can import your attendees, your workshops, and everything to quickly get started. To make it as simple as possible we have defined a bunch of formats to follow. By creating a file as explained below, you can directly upload the file and **Conference Tracker** will recognize it as valid one, knowing completely what to do.

File Format

By now, only **comma-separated-values (CSV)** files are supported. This format is broadly supported by many application including Microsoft Excel; it also can be created using any simple text editor. In the first line of the file the headers must be included (check the list of valid headers below), then, the data must be included separating each column by a comma. In the case you need to write a comma in the data itself, you can prevent format errors by enclosing the full value in double quotes.

Valid Headers

To import **attendees**, you need to specify the following headers:

Required headers: FirstName, **MiddleInitial**, **LastName**, **Email**

Optional headers: CardNumber(This will be the number on the ID Badge Barcode), **Address**, **City**, **State**, **ZipCode**, **PhoneNumber**, **Title**, **Company**

To import **sessions/workshops**, you need to specify the following headers:

Required headers: Name, **StartTime**, **EndTime**, **Room**

Optional headers: Credits, **Speakers**, **RequiresSignOut**, **RequiredPresencePctg**

To import workshop registration, you need to specify the following headers:

Required headers: Workshop, **Email**

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Attendees Import

FirstName	MiddleName	LastName	Email	CardNumber
Winnie	T	Pooh	wpooh@contrack.com	1089
Roger		Rabbit	roger.rabbit@conftrack.com	1035
Donald		Duck	duck@conftrack.com	6584
Fred		Flintstone	fred@conftrack.com	1078
Homer	J	Simpson	homerjs@conftrack.com	1812

Download the example file(.csv)

Sessions/Workshops Import

Name	StartTime	EndTime	Credits	Room	Speakers
Faster Design Decisions wit	6/1/2012 10:00 am	6/1/2012 11:00 am	2	.NET Room	Eric Smith
Styles of Redesign	6/1/2012 11:00 am	6/1/2012 12:00 am	3	Mobility	Mike Williams
Rolling Up Our Responsive	6/1/2012 11:00 am	6/1/2012 12:00 am	2	.NET Room	John Doe
Mobile to the Future	6/1/2012 10:00 am	6/1/2012 11:00 am	2	Mobility	Elton Myers
The Future of CSS	6/1/2012 12:00 pm	6/1/2012 1:00 pm	1	.NET Room	Mary O'Connor

Download the example file(.csv)

Note that when you import the sessions it's important that you select the correct time zone. It has to match the data your uploading, which is not necessarily the time zone of the place where you currently are. E.g. you might be now in New York, but if the conference will take place in San Francisco, then you should select '(GMT-08:00) Pacific Time (US & Canada)'.

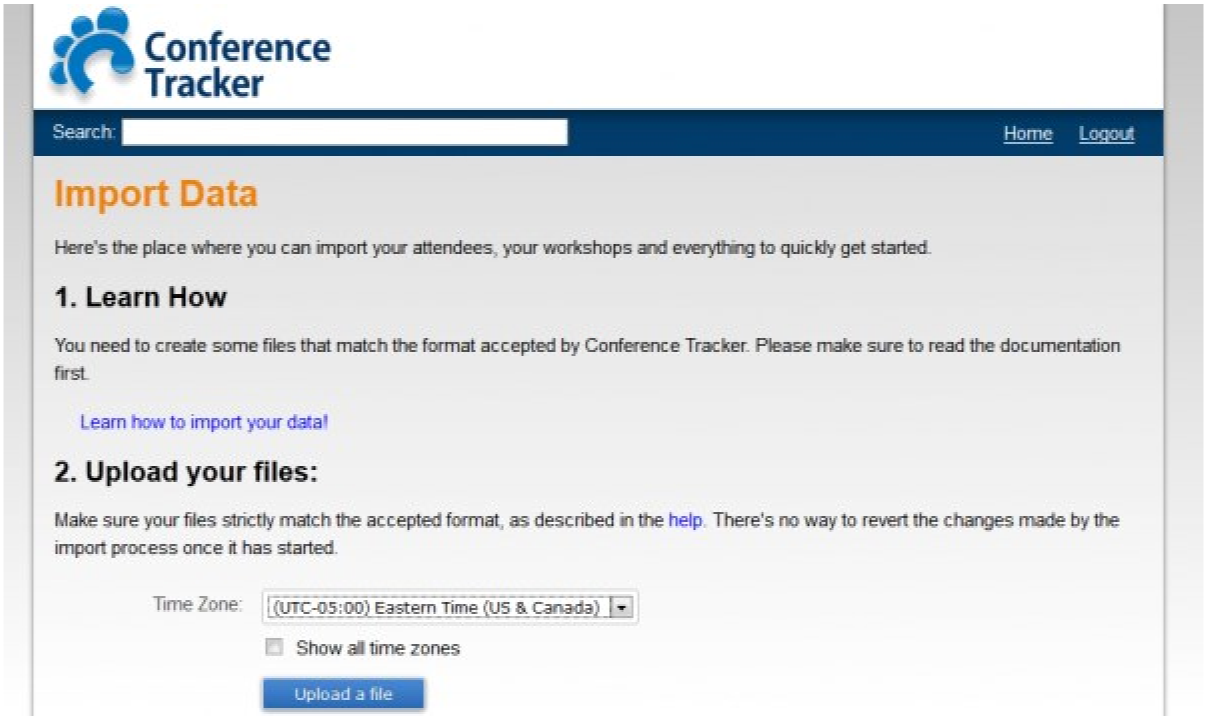
Sessions/Workshops Registration Import

Workshop	Email
Faster Design Decisions with Style Tiles	eric.smith@conftrac.com
Styles of Redesign	mwilliams@engineerica.com
Rolling Up Our Responsive Sleeves	john.doe@engineerica.com
Mobile to the Future	myers@conftrac.com
The Future of CSS	maryoconnor@conftrac.com

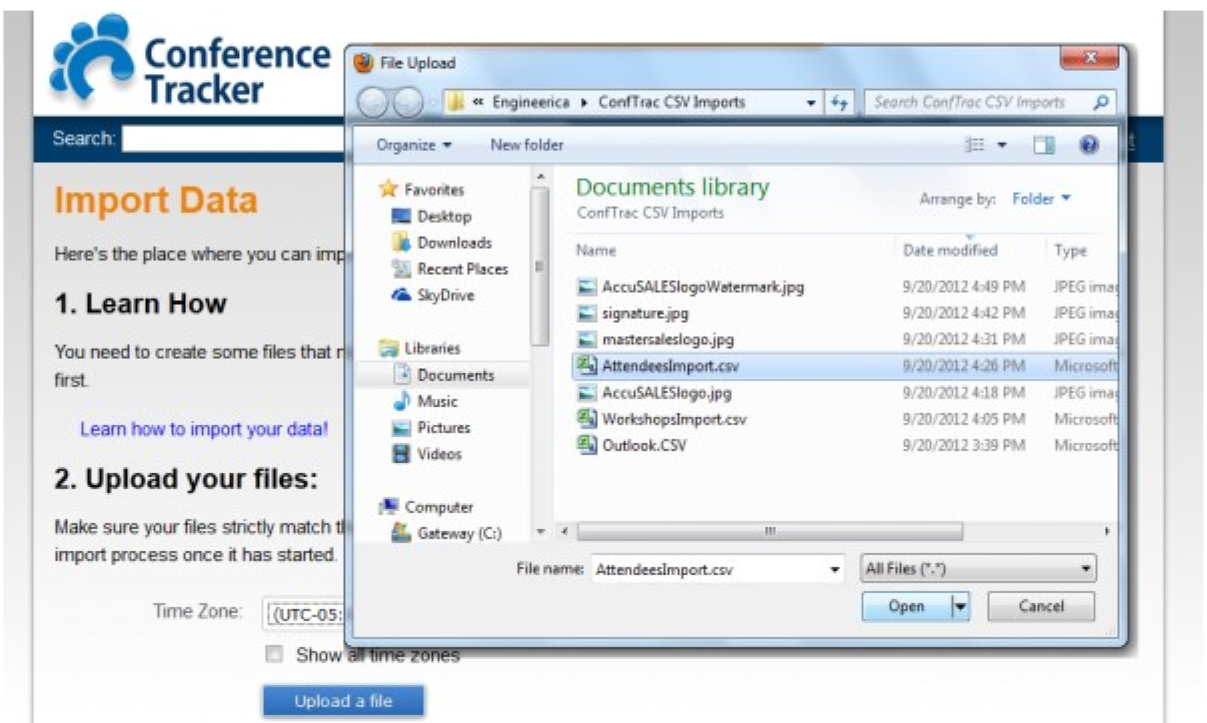
Download the example file(.csv)

Running the Import File

Once you've got the CSV files prepared and ready, let's move on to uploading your files. To get here just click on the **Import Sessions** button from the **Conference Sessions** screen.



To import the CSV files you created you just have to click the **upload a file** button.

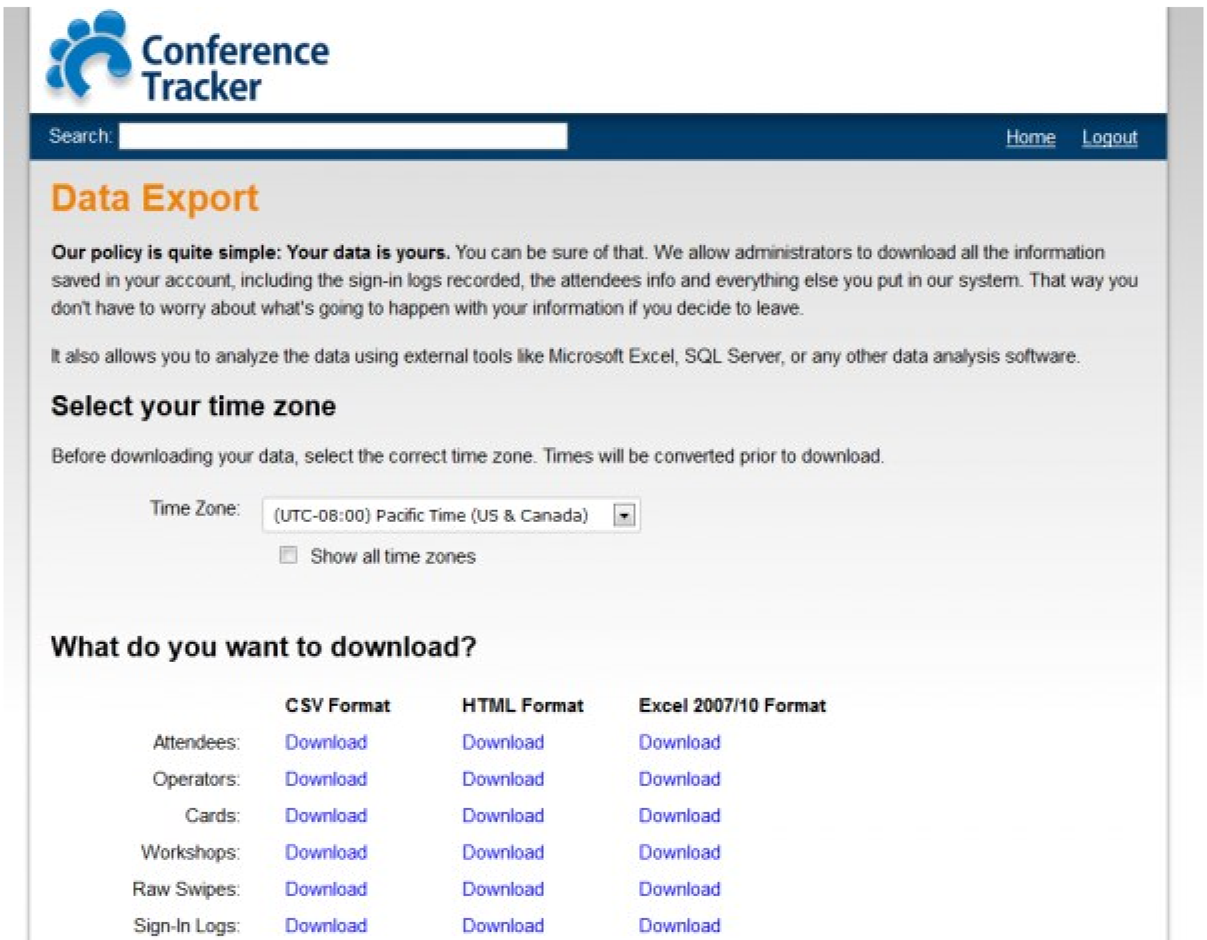


Browse your PC to find the CSV files and click open to upload and done!
A confirmation will be at the bottom of the screen.

Export Data

Conference Tracker will allow you to download the conference information for any of the sections you want:

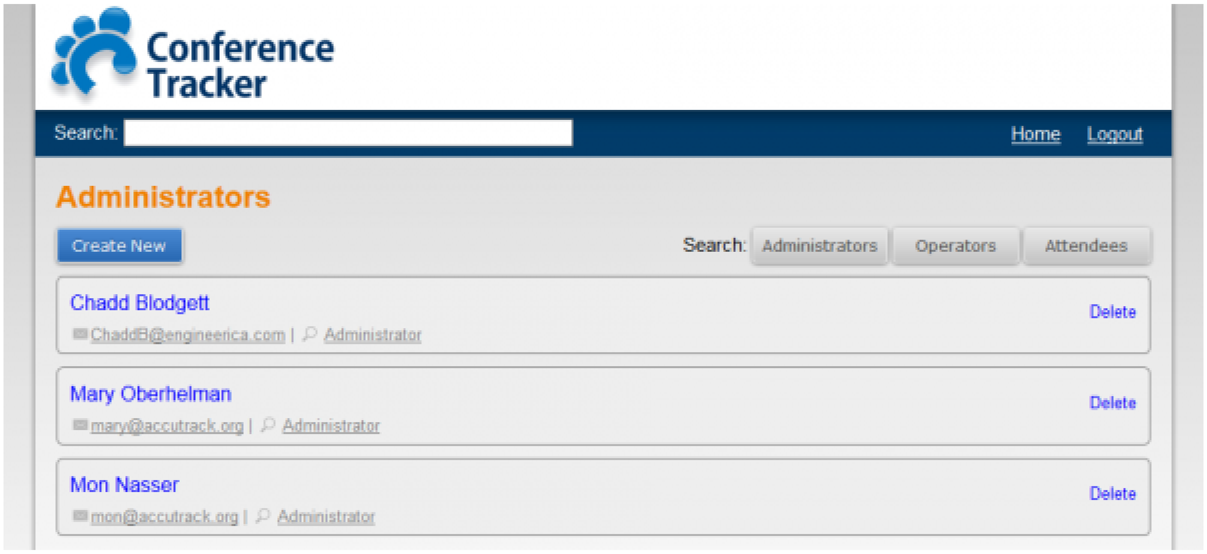
- Attendees
- Operators
- Cards
- Workshops
- Raw Swipes
- Sign-In Logs



Tracking Conference has the ability to save your information to all the following file types - **CSV**, **HTML**, and an **Excel Spreadsheet**. To export click on Download and wait until it says your data is ready! Once again click on View Attendees which will let you download the file to your computer.

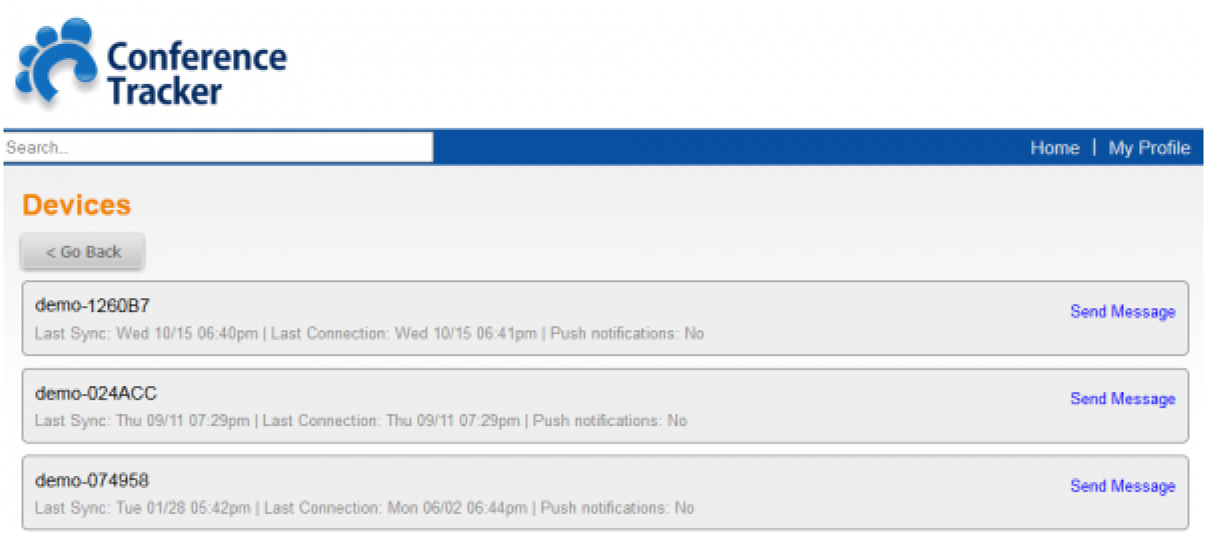
Administrators

This is where you can manage your administrators information.



Devices

This is where you can view your list of devices the Operators are using and can also send messages to them if “Push Notifications” were enabled for the app after the install process on the Apple device.



On the far right side notice the “Send Message” link on each device. Simply click this link and type a message (up to 100 characters only) and click the send button.

If push notifications are not enabled you may receive this error:

Enable Push Notifications

Push notifications require an active Wi-Fi or cellular connection. If you're not getting notifications for a specific app, try these steps:

1. Go to **Settings** > **Notifications** to verify that the iConf app is showing up in the push notifications. If notifications do not appear in the Notification Center, make sure that the Notification Center setting for the app is enabled.
2. Make sure you're signed in to your Apple ID.
3. If you've recently installed an app or restored a backup, open the app to start getting notifications.

Reference: *About Notifications on iPhone, iPad, and iPod touch (Apple.com)*

Settings

This area allows you to customize some of the settings in Conference Tracker.

General

Set your Time Zone that the conference is taking place in so when you import the data it will sync with Apple devices properly.

Sign-Out

Require users to sign-out: Enable this option if you want users to sign-out after each session. Users will be allowed to sign-out in the middle of a session and sign-in again when they come back. If this option is not enabled, users will only have to sign-in at the beginning of session.

Required presence: It's a value between 1 and 100 indicating the percentage of time that users must be in a session to gain the credits.

Overwrite sign-out settings of existing workshops As these values can also be defined per workshop, if you check this all workshops will be overwritten using these values. - Use this to quickly overwrite all workshops using the sign-out settings.

Registration

Confirmation Message: This is a brief message that you can complete using the word-like tools to confirm the users registration to the conference.

Online Payments

These options allow you to enable payments from credit cards through a PayPal account when Attendees complete their online registration. Here are the options:

- **Enable PayPal Payments:** This allows you to start taking payments via Conference Tracker's online registration process.
- **Test using PayPal's Sandbox:** This allows you to state that you are testing so no actual payments will be made in this mode.
- **Merchant ID / Email:** This is where you would enter your PayPal Merchant ID or if using a personal account your e-mail address. For more information on setting up a PayPal account visit www.paypal.com.
- **Base Reg. Fee:** This is the base cost in US dollars to attend the conference.
- **Base Reg. Fee - Early Bird:** This is the discounted cost in US dollars if they signup by the Early Bird Date below (leave blank if you do not wish to offer this discount).
- **Early Bird Date:** This is the date in which you would allow registration to be discounted.
- **Auto-accept paid registrations:** This allows Conference Tracker to automatically accept paid registrations so you do not have to accept them manually. If you prefer to do this yourself or have someone monitor these registrations please uncheck this box.
- **Payment information e-mail subject:** This is the Subject for the e-mail notification of payment from Conference Tracker.
- **Payment information e-mail body:** This is the Body of the e-mail notification of payment from Conference tracker.
- **Send an e-mail when a payment is confirmed:** This enables the automated payment confirmation e-mail. If unchecked the Attendee still will receive the e-mail message from PayPal and an on-screen confirmation of payment.

This is a detailed summary of charges in case you added multiple items on the registration form itself. PayPal will also send a confirmation of the total charges.