Conference Tracker Reference Manual

Conference Tracker

Version 2.0 – May 2016

Conference Tracking Made Easy©

Engineerica

Conference Tracker – Reference Manual

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Introduction

Conference Tracker

Conference tracking made easy™

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

This software is a simple, web-based, conference tracking solution to track your attendees' session/workshop attendance, manages members, and with the ability to create ID badges & completion certificates/transcripts. 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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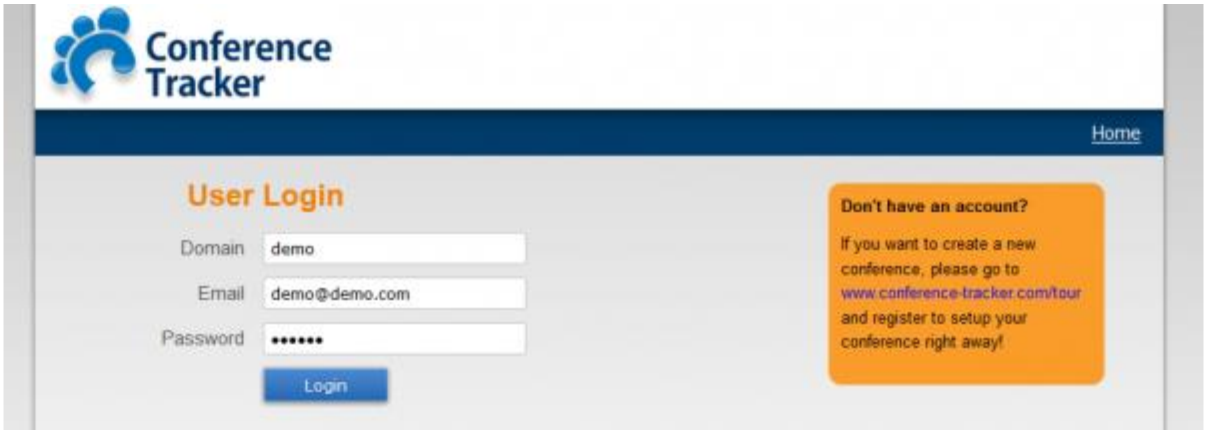
Getting Started

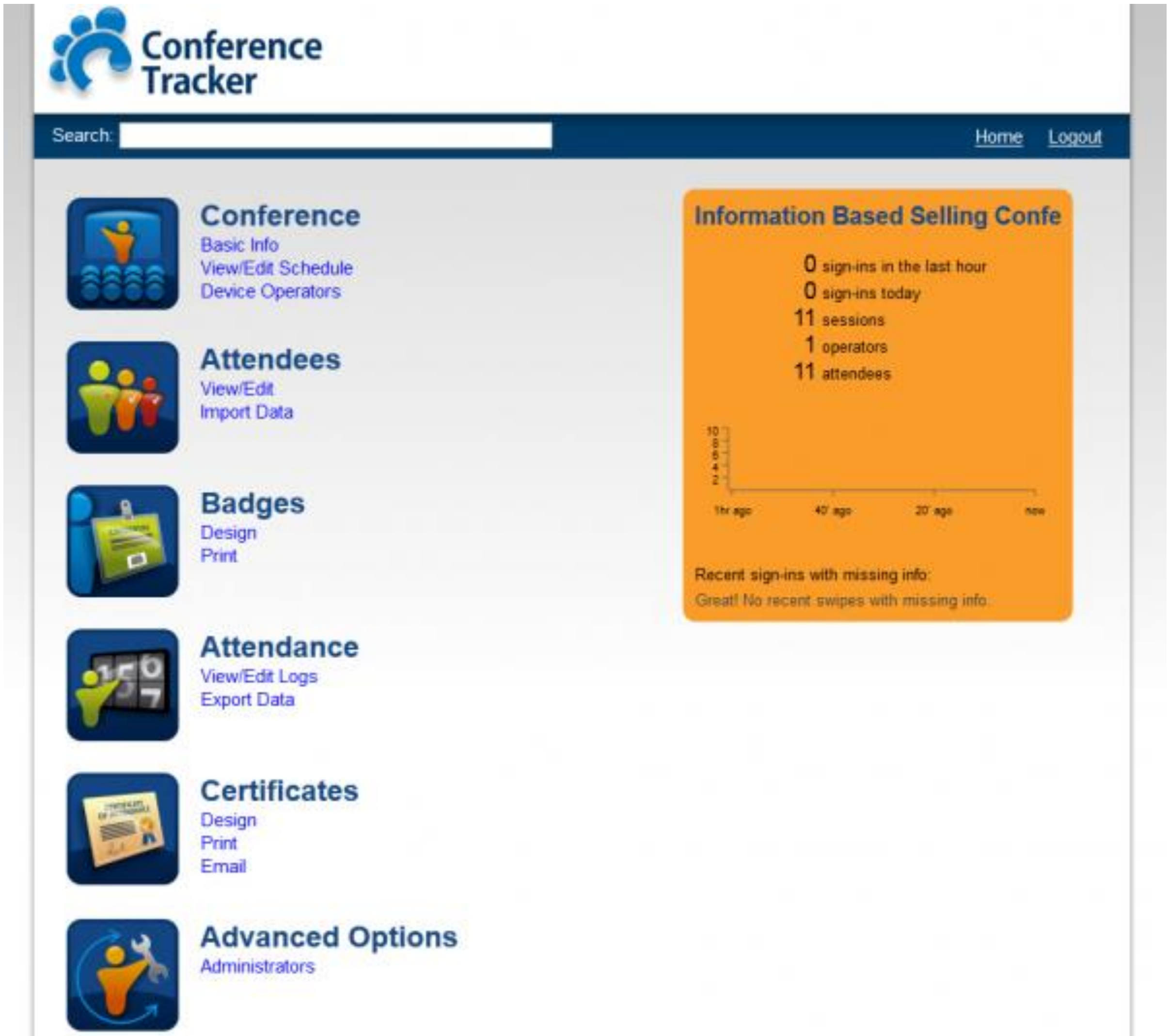
You can get started by accessing your **Conference Tracker** account by typing in http://www.conftrac.com/#Login in any web browser.



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**.



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.

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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.
- **Enable Attendee Registration** Check this box to enable Conference Registration. This feature offers the ability to accept Credit Card and/or PayPal payments using your own PayPal account.
- **Enable Exhibitor Registration** Check this box to enable Exhibitor Registration. This feature now offers the ability to register all Exhibitor representatives at once and collect their payment through PayPal.
- **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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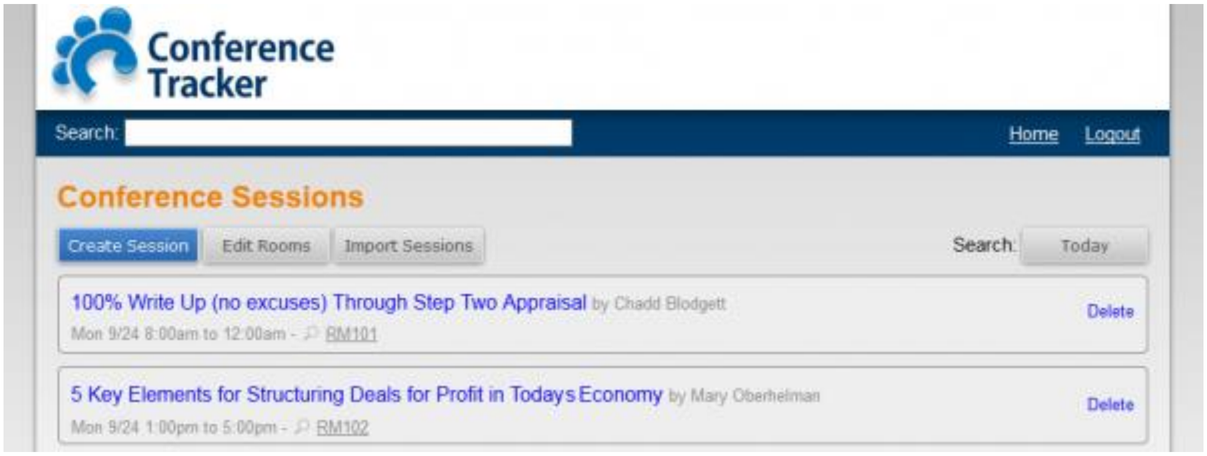
View/Edit Schedule (Conference Sessions)

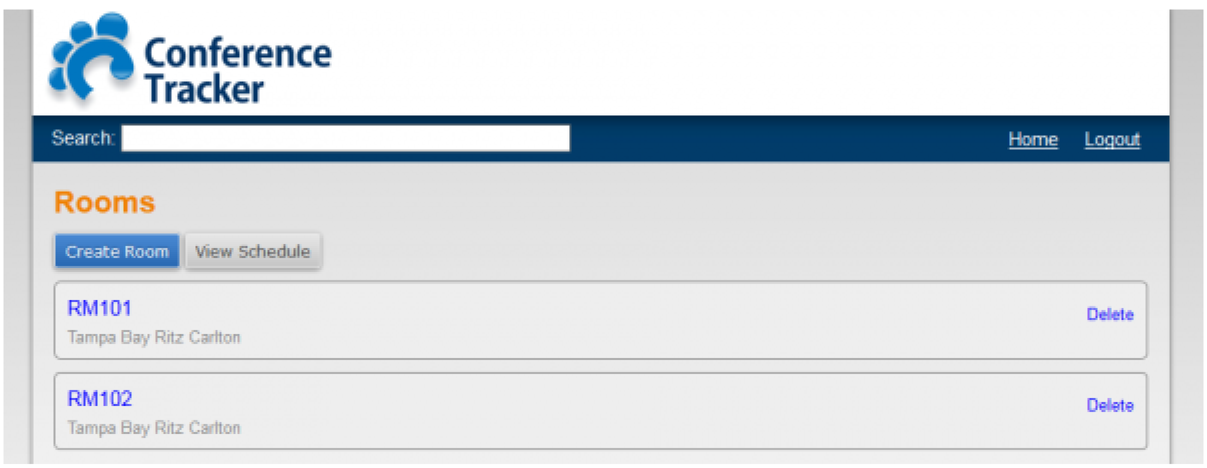
This is the section where you can create your workshops or sessions, add rooms, or even import your workshops or sessions.



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 created rooms then this can be done by clicking on the **Create Room** button. Rooms become important when tracking the sessions on the Conference app because you can set a device to that room and it will follow the schedule. The **View Schedule** button will take you back to the **Conference Sessions** screen.



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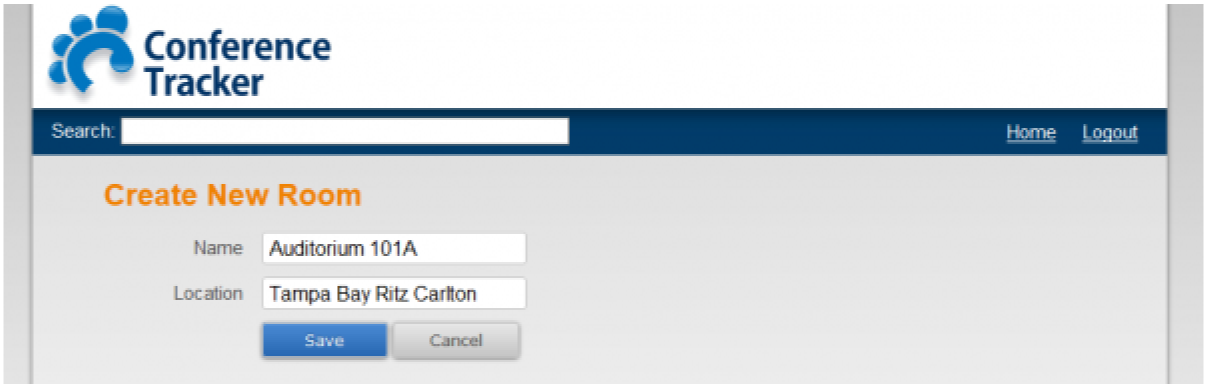
Create Room

By clicking on the **Create Room** button on the **Edit Rooms** screen, it will take you to this screen. To create new rooms 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.

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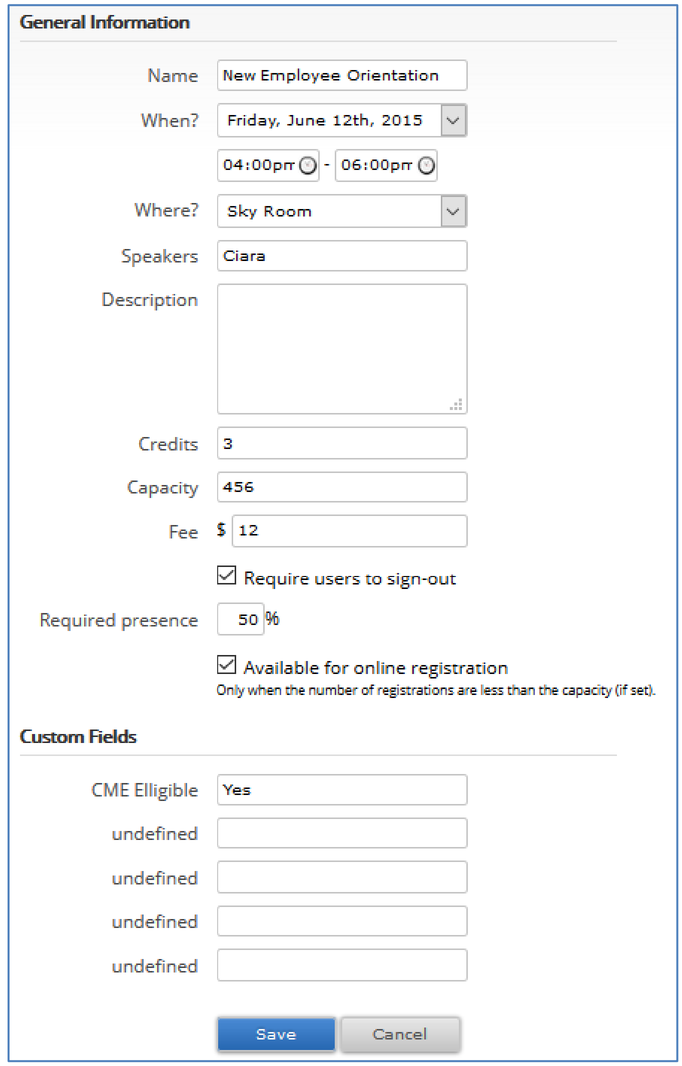
Create Workshop/Session

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. Once done, click Save to create.

General Information



Name - This is the name of the workshop that you want to appear on the Apple devices and in Conference reports.

When? - This is the date of this workshop. Select from the available dates in the drop-down menu and then select the Start time/End time of the workshop. *Note: To add additional dates visit the Basic Info section on the Home screen under the Conference heading.*

Where? - This is the Room that this workshop will take place. Select from the available Rooms in the drop-down menu. *Note: To add additional Rooms go back to the View/Edit Schedule section on the Home screen under the Conference heading.*

Speakers - This is an optional field to specify the person speaking at the workshop/session.

Description - Optionally give this workshop/session a description which Attendees will see when choosing them on the Online Registration form.

Credits - This item states how many credits the Attendee will earn if meeting the attendance requirements of this workshop/session.

Capacity - This is to let the system know how many Attendees can sign-up for the workshop/session before it becomes full on the Online Registration form.

Fee - This is the optional fee that can be added for signing up to attend this class from the Online Registration form.

Require Users to Sign-out - Check this off if you want the Attendees to have to swipe out at the end of the session.

Note*: Even if you do not require them to sign-out you need to place a 1 in the Required Presence field.*

Required Presence - This is the percentage of time they must have been signed in for to obtain the credits for this workshop/session.
Available for online registration - Uncheck this box if you do not want Attendees to see this workshop/session on the Online Registration form.

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Custom Fields

These are the custom fields are in setup in the Settings of the Conference Tracker account. If not using these fields simply ignore them. You can also import these on the Attendee import and display them on certificates and transcripts.

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.

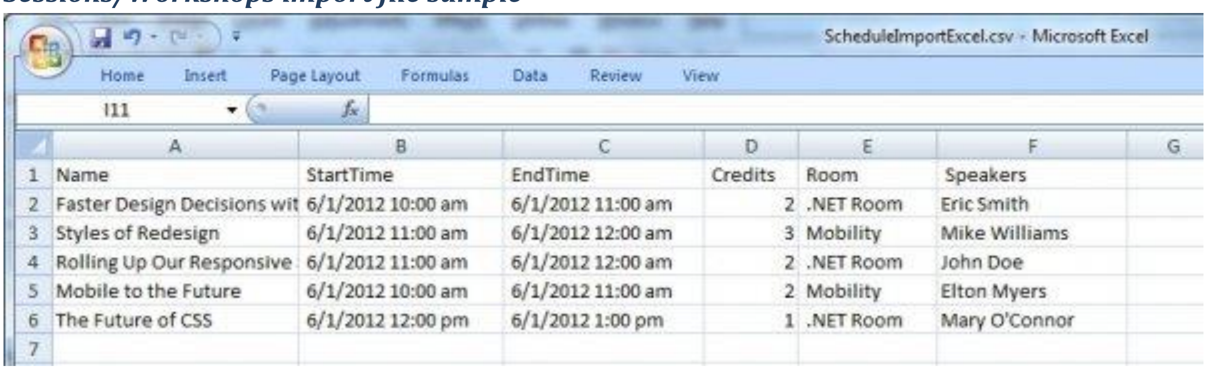
File Format

By now, only **comma-separated-values (CSV)** files are supported. This format is broadly supported by many 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 **sessions/workshops**, you need to specify the following headers: **Name**, **Start Time**, **End Time**, **Credits**, **Room**, **Speakers**

Sessions/Workshops import file sample

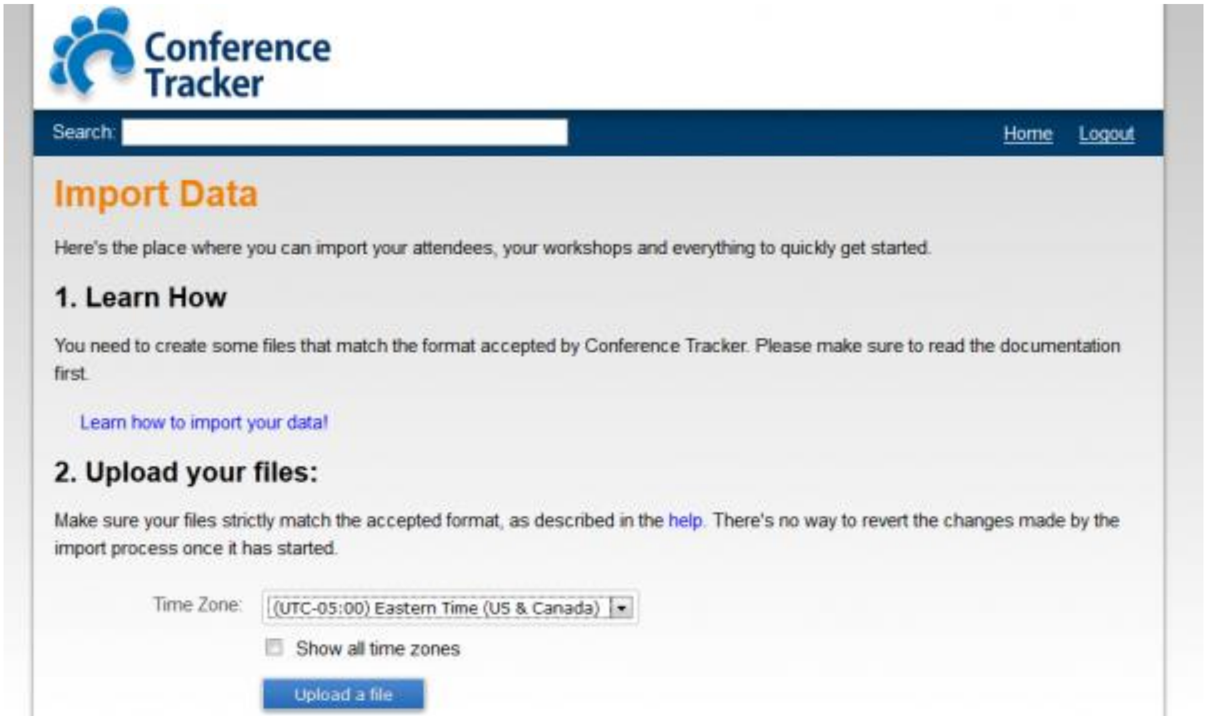


	A	B	C	D	E	F	G
1	Name	StartTime	EndTime	Credits	Room	Speakers	
2	Faster Design Decisions wit	6/1/2012 10:00 am	6/1/2012 11:00 am	2	.NET Room	Eric Smith	
3	Styles of Redesign	6/1/2012 11:00 am	6/1/2012 12:00 am	3	Mobility	Mike Williams	
4	Rolling Up Our Responsive	6/1/2012 11:00 am	6/1/2012 12:00 am	2	.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							

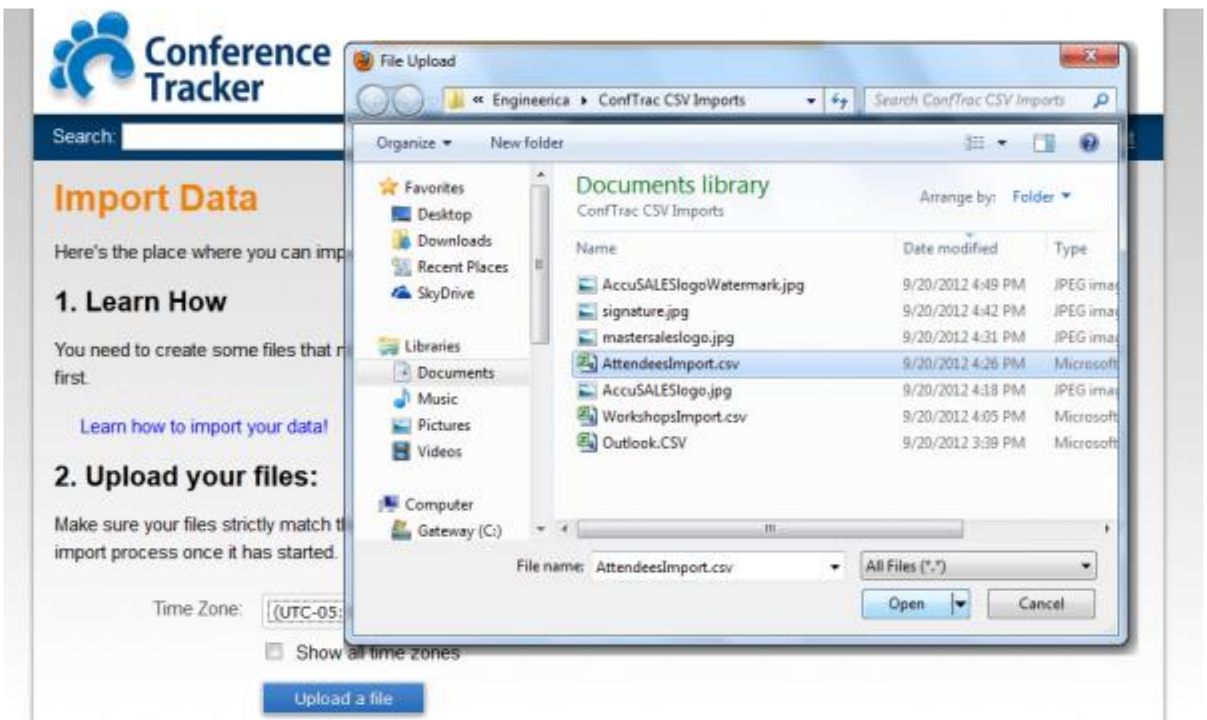
[Download the example file (.csv)]

Note that when you import the sessions it's important that you select the correct time zone. It has to match the data you're 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.

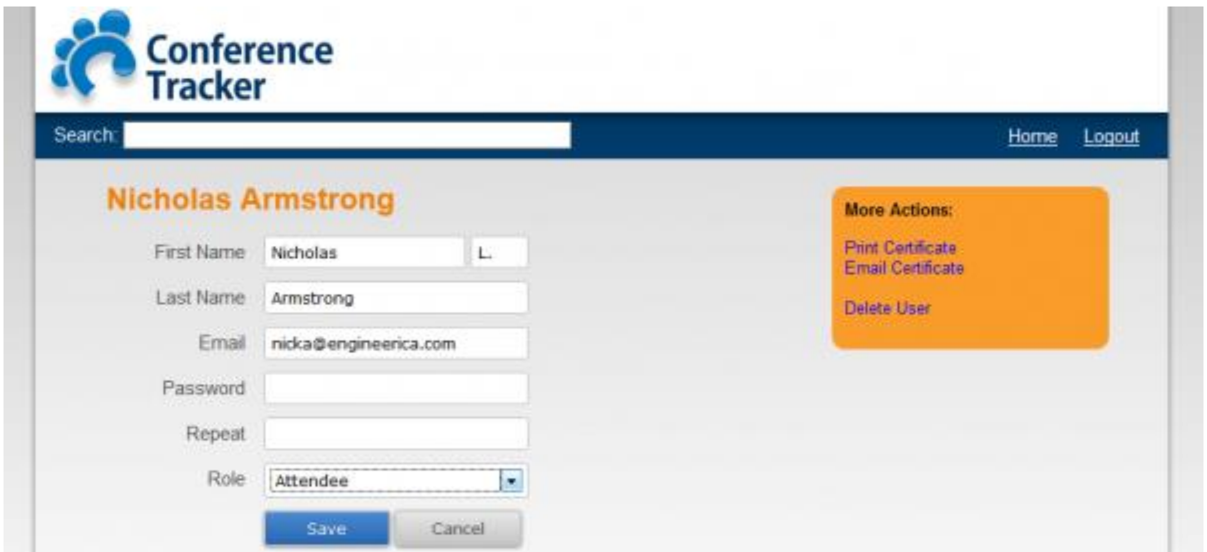


Browse your PC to find the CSV files and click open to upload and done! A confirmation will be at the bottom of the screen.

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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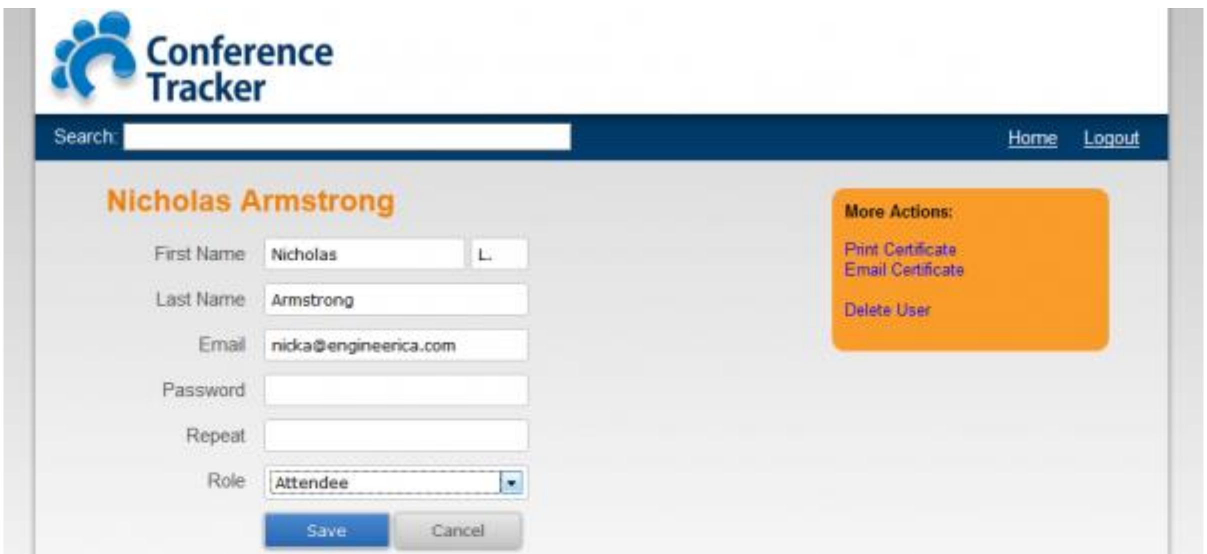
Presenters

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.

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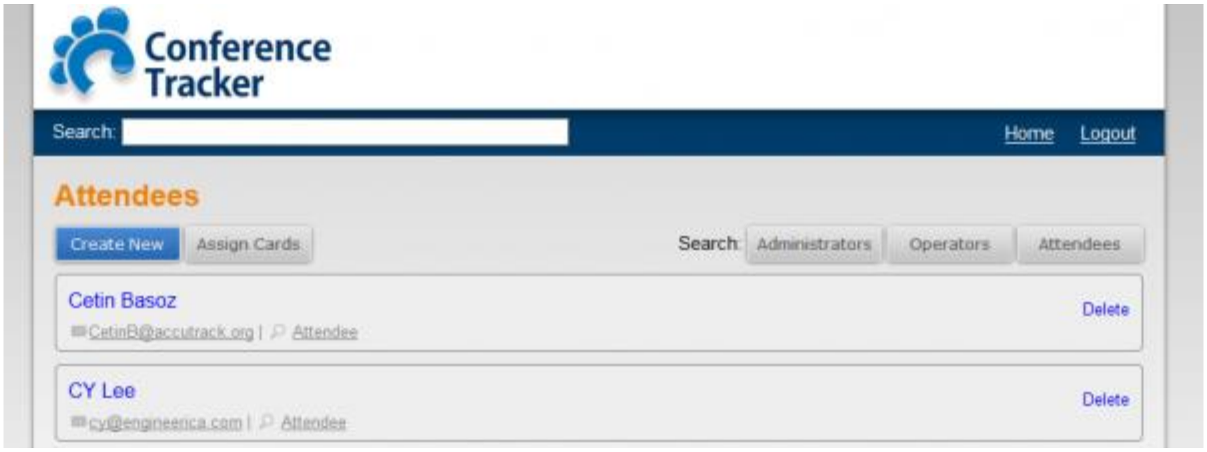
Attendees

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

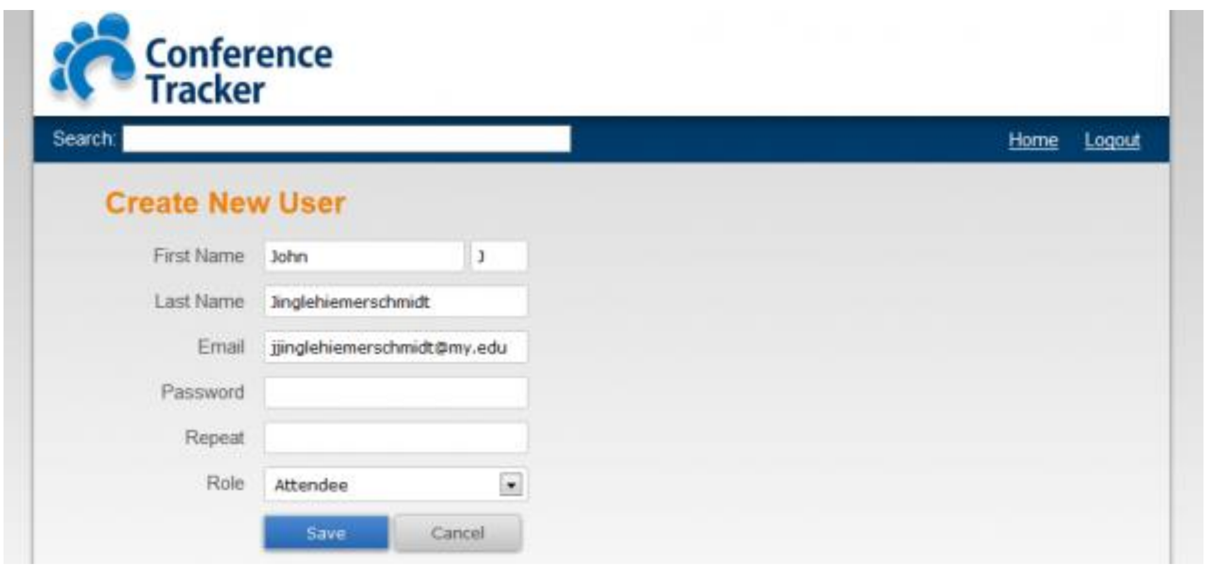
Search Filters

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.

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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.

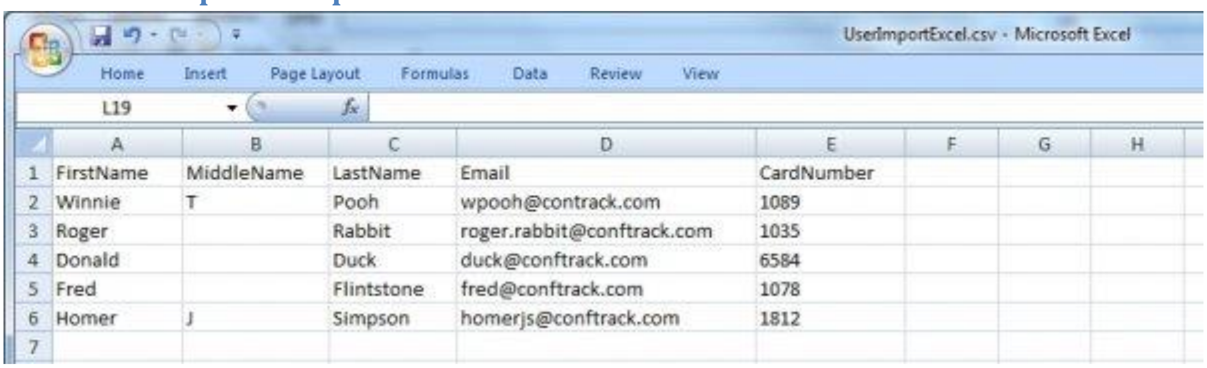
File Format

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)

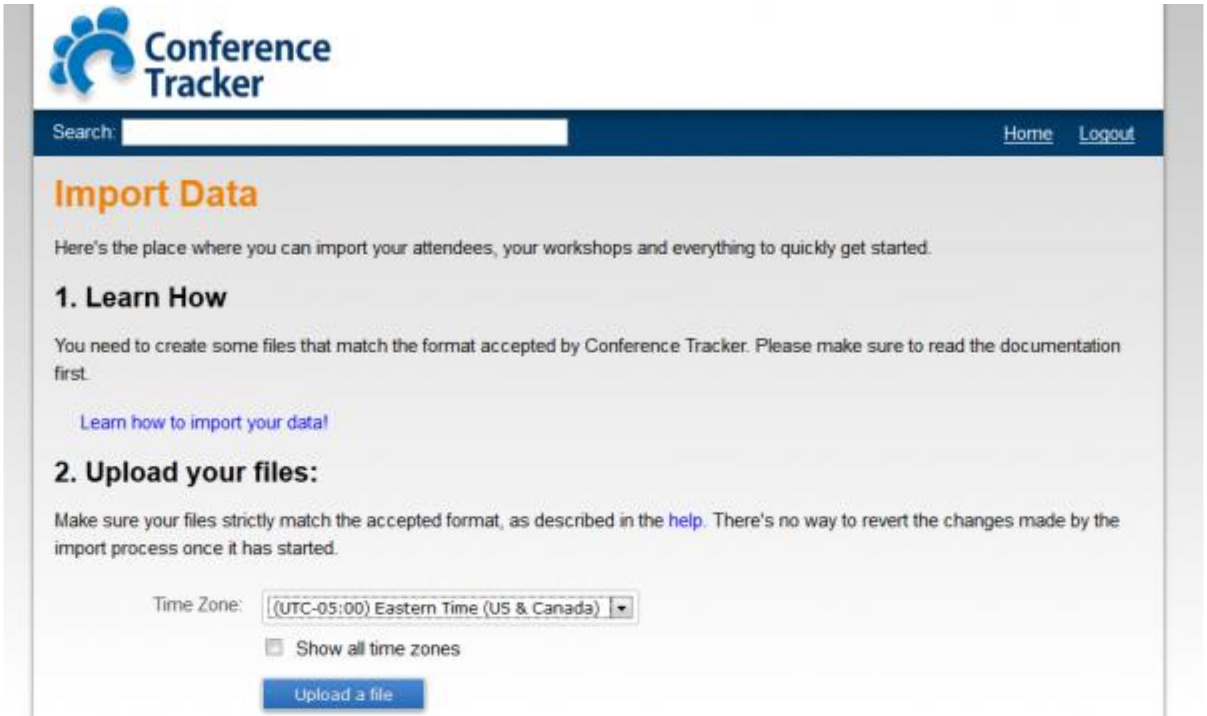
Attendees Import Sample



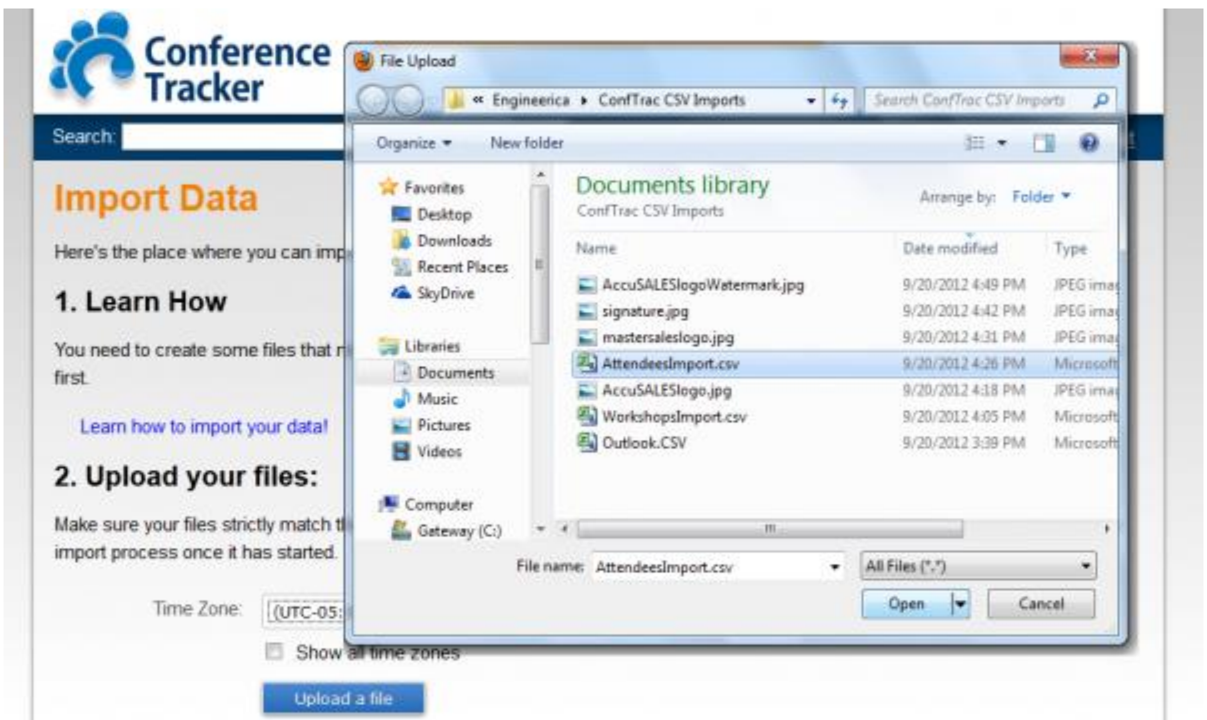
	A	B	C	D	E	F	G	H
1	FirstName	MiddleName	LastName	Email	CardNumber			
2	Winnie	T	Pooh	wpooh@contrack.com	1089			
3	Roger		Rabbit	roger.rabbit@conftrack.com	1035			
4	Donald		Duck	duck@conftrack.com	6584			
5	Fred		Flintstone	fred@conftrack.com	1078			
6	Homer	J	Simpson	homerjs@conftrack.com	1812			
7								

[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.



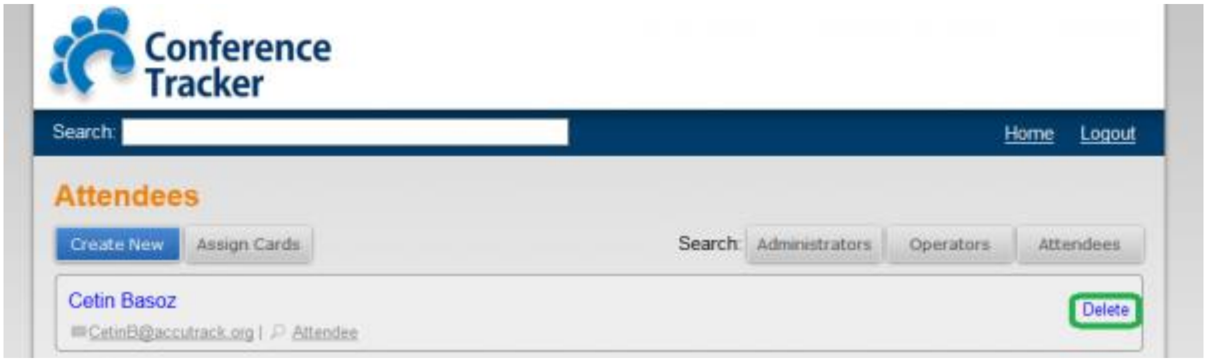
To import the CSV files you created you just have to click the **upload a file** button.



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

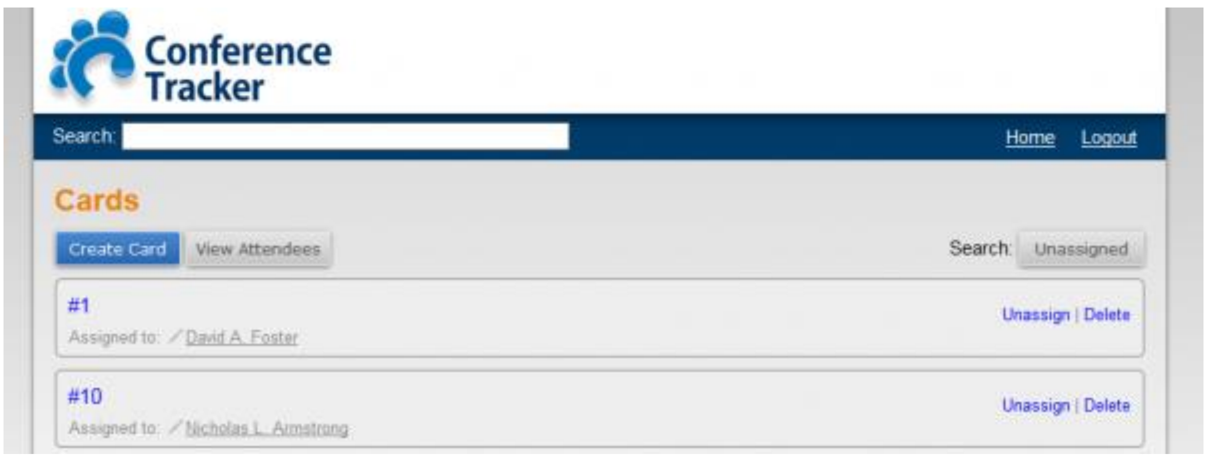
To delete an Attendee just click on the **delete** link at the end of their name in the list on the Attendees screen.



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.

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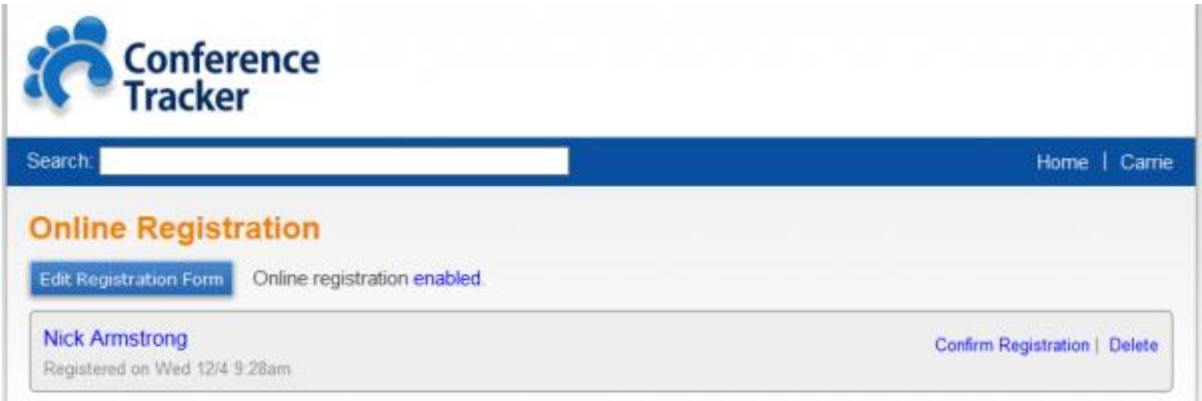
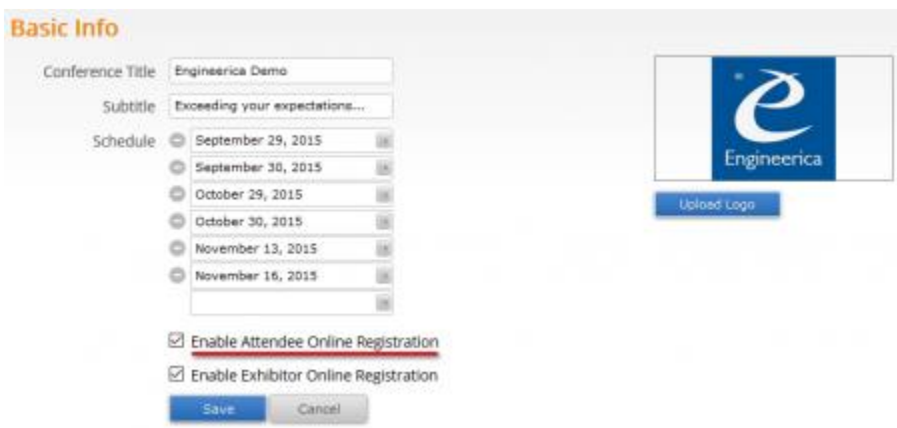
Online Registration

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.



Create/Edit Registration Form

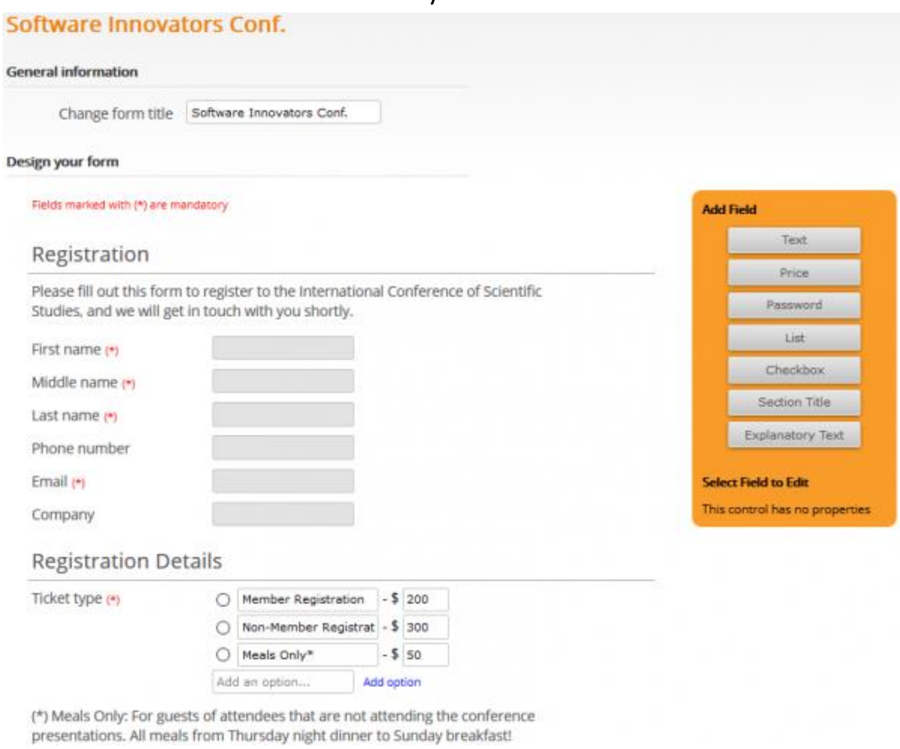
If you have already enabled Online Registration you can now edit your registration form by clicking the **Edit Registration Form** button. Here you can add your own custom fields in addition to the default fields in the system. There are 7 types of fields:

1. **Textbox** - The purpose of this item is simply if you want to get a text response from the registrant.
   - Properties:
     - **Required** - Use this option to make a response required (Yes) or optional (No).
2. **Price** - The purpose of this item is to allow your registrant to add any price value to their final payment (Typically used for donations).
   - Properties:
     - **Required** - Use this option to make a response required (Yes) or optional (No).
3. **Password** - This item is basically a text box that hides the characters and could be used to hide sensitive information. Note: You'll get 2 fields so the user will have to verify the information.
   - Properties:
     - **Required** - Use this option to make a response required (Yes) or optional (No).

- **Minimum length** - Use this option to set the minimum length required for the password.

4. **Listbox** - The purpose of this item is to allow the registrant to select one or multiple item(s) from a list of options. Note: You can now add prices to these options to be tallied on final payment.
   - Properties:
     - **Required** - Use this option to make a response required (Yes) or optional (No).
     - **Multiple selection** - Use this option if you want the registrant to have more than one selection.
     - **Allow Prices per Option** - Use this option if you want to associate prices with each list item that will be added to their final payment.
5. **Checkbox** - The purpose of this item is to allow the registrant to check a box on the registration form (typically used to confirm consent).
   - Properties:
     - **Required** - Use this option to make a response required (Yes) or optional (No).
6. **Section Title** - The purpose of this item is to separate portions of the form with headings.
7. **Explanatory Text** - The purpose of this item is to provide additional information to registrants while they are completing the form.

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 you are done with the **Save** button at the bottom of the form.



You can now mark sessions for online registration. Marked sessions will appear on the Conference Tracker online conference registration form. Attendees will see a description of these sessions and will be able to sign up for them. The software will keep track of the registrations and will allow attendees to register until the room reaches its full capacity!

Click here to learn more about how to enable this feature.

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Registration Options

The other options aside from editing the registration form you have here allow you quickly confirm all registrations using the **Confirm All** button and the Share Option.

Confirm All

Confirm All could possibly be used if you want to quickly add every received registration form regardless of its phase. This will make more sense after reading **The Registration Process** section below.

Share

This area allows you to get iframe html code to add the registration form to your own website, offers quick Social Media options to share information about registering for the conference, and finally a direct link that you can e-mail to possible attendees so they can register for the conference.

Send Payment Instructions

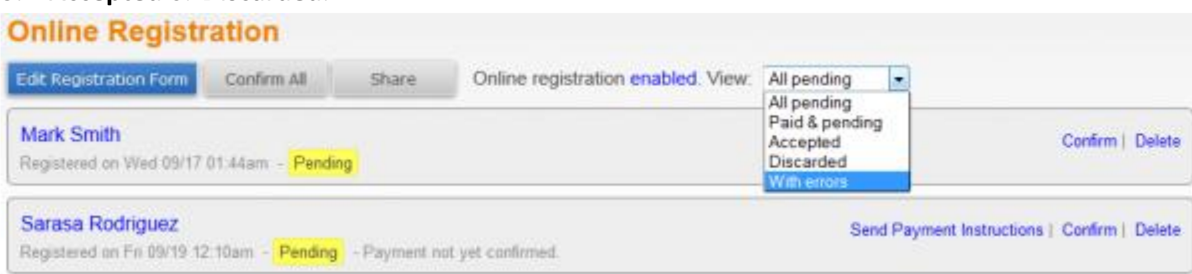
Use this button to send all the pending attendees the payment URL/information to complete the process through PayPal. This is only necessary if you are using PayPal through **Conference Tracker** and online payments are activated.

The Registration Process

This area can get confusing for first time users so this next section is here to help clarify the process of Attendees registering for the conference.

The next topic to discuss is the life-cycle of a registration goes through several phases in this order:

1. **Pending** or **With Error**
2. **Paid & Pending** (Can be skipped if you set to auto-accept paid registrations.)
3. **Accepted** or **Discarded**.



Pending or With Error

Pending

This means that the **Attendee** has filled out the registration form but it has not been approved. This phase is when the attendee has not paid for the Conference. From here you can select the option on the Attendee's line to "Send Payment Instructions" as pictured above.

With Error

These are the registration forms that have been completed with errors. Several examples may be the e-mail address was formatted incorrectly like "mi ke@abc.com" or the phone number is missing a digit like "407-555-555_". Here you'll have the ability to make these corrections.

Paid & Pending

Attendees will only show up in this phase if “Auto-accept when payment received” is not turned on in the conference settings. Here you can manually accept the Attendees who've paid their registration fees.

Accepted or Discarded

These are lists of all the Accepted Registrations and Discarded ones you chose to delete.

Accepted

This is a list of all the Accepted Registrations.

Discarded

This is a list of all the Registrations Discarded you chose to delete.

You can look at each of these using the dropdown box labeled *View* in the top right of the Online Registration screen (pictured in the screenshot above).

Registration Analytics

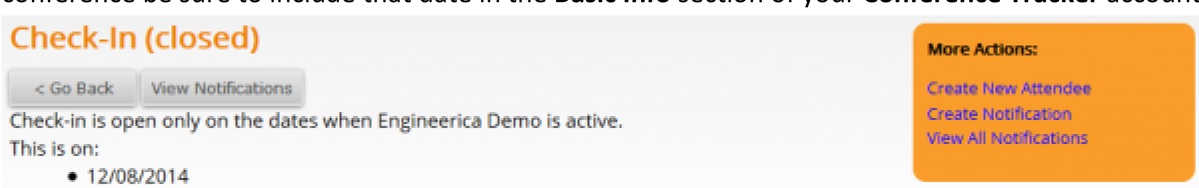
Run this handy tool to know things like most popular session/workshops based on sign-ups, responses to meal plans or other custom questions, and number of attendees per session. Use this for better planning for your conference.

Check-In

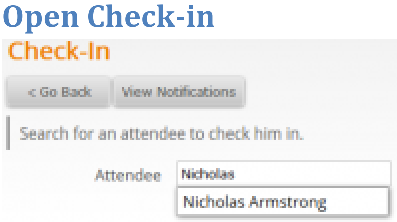
In this section this is where you Check-in **Attendees** for the conference and give them **handouts** you previously created in the conference details section. Each time you check-in a person you can provide additional comments about the **Attendee**.

Closed Check-in

This simply means that today is not one of the dates of the Conference as **Check-ins** can only be done while the Conference is going on. This means if you plan on doing **Check-Ins** the night before the conference be sure to include that date in the **Basic Info** section of your **Conference Tracker** account.

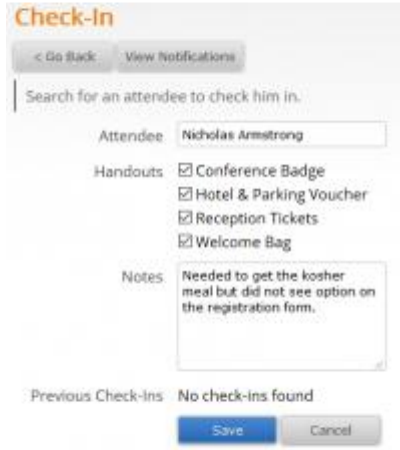


Open Check-in



This would display on the dates of the conference and allow you to **Check-in Attendees** to pick-up their **Handouts** and provide any last minute notes. To accomplish this task just follow the process below:

1. Type the name of the attendee and if registered they should show up in the list. And now select their name in the list.



2. Once selected check of the items they are picking up from your area and provide any notes regarding the person and or comments. This could be as simple as "Had to register and create badge for this person." etc.

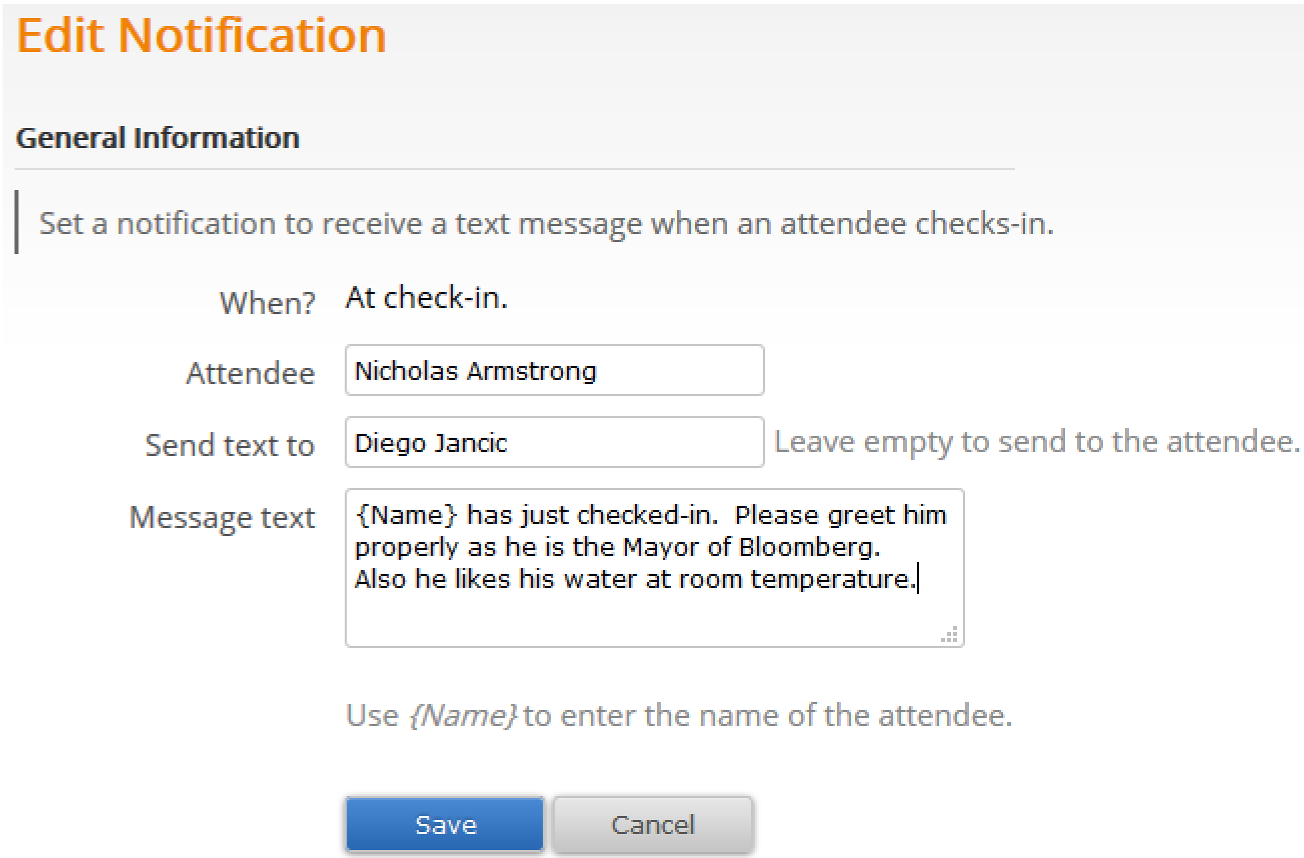
3. Finally click the **Save** button at the bottom of this page to get a confirmation message.

At this time if there were any notifications setup to go out they would be triggered and send the e-mail notification messages out.

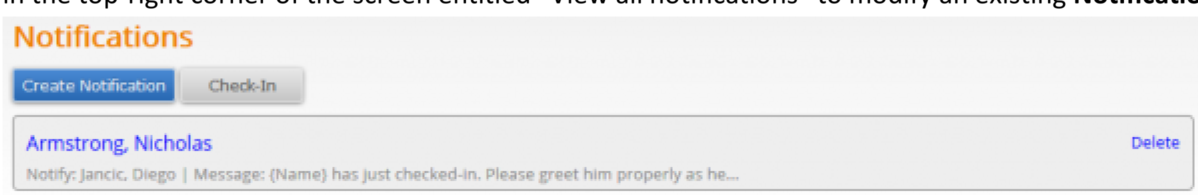
New-Arrival Notifications

These are reminders that can be created when a special needs and/or VIP person arrives so you or others can be notified.

Create Notification: Use the **Create Notification** link in the orange box in the top-right corner of the screen to initiate a new Notification.



Edit Notification: Use the **View Notifications** button at the top of the page or use link in the orange box in the top-right corner of the screen entitled "View all notifications" to modify an existing **Notification**.



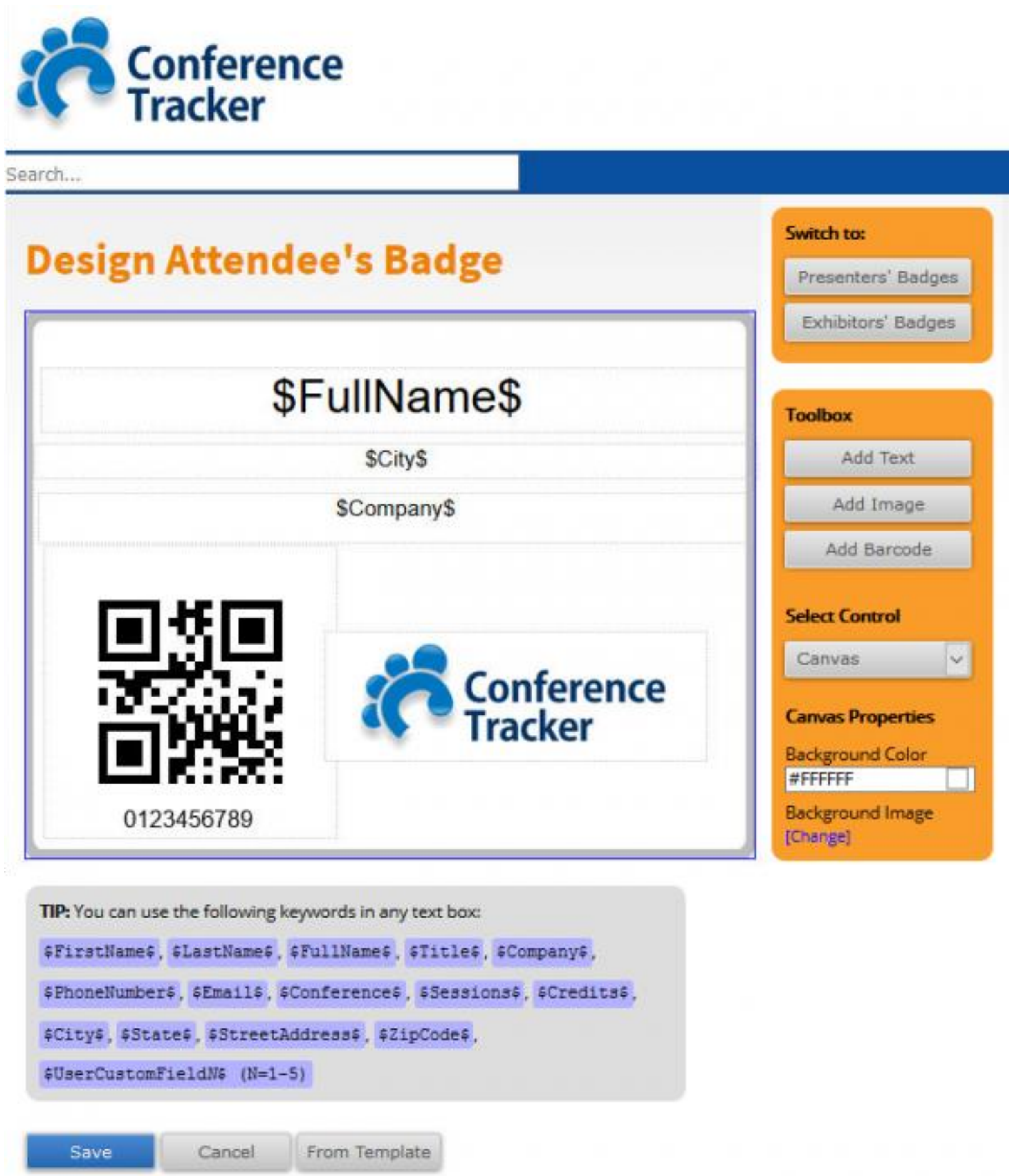
Delete Notification: When viewing all the notifications you can click the **Delete** link on the far right of the notification itself and confirm the OK in the popup message to delete an existing notification.

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:

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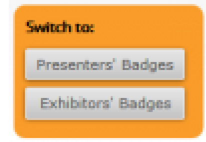
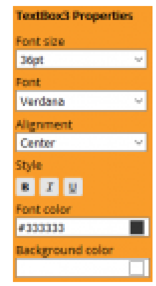
Badge Selector



- **Presenter Badge Button:** Use this to start designing the Presenter badge.
- **Exhibitor Badge Button:** Use this to start designing the Presenter badge.
- **Attendee Badge Button:** Use this to start designing the Attendee badge again. ***Note:*** *Only visible if you click one of the other badge types.*

Be sure to click the Save button at the bottom of the page before selecting a different badge designer.

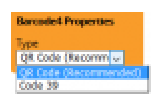
Toolbox



- **Add Text Button:** Create a box where you can enter text.
  - **Font Size:** Adjust the size of the text.
  - **Font:** Adjust the type of the font used in the textbox.
  - **Alignment:** Aligns the text with in the box area you draw.
  - **Style: Bold**, *Italic*, and *Underline* options.
  - **Font Color:** Adjust the color of the text.
  - **Background Color:** Adjust the background color of the textbox area.

- **Add Image Button:** To add images to canvas the badges.
  - **View Original:** This opens the image in a separate tab/window so you can see the original size/image.
  - **Select:** Use to select the location and file of the image you want to insert.
  - **None:** Use this to remove all images from the image box.

- **Add Barcode:** This allows you to add either QR or 39 barcodes to your badges.
  - **Type:** Use this to select either **QR Code** or **Code 39** barcodes. We recommend using the **QR code** as they are ideal for readability using the camera on the Apple devices.



- **Select Control** This is used to select a part of the **Badges** you want to edit and when selecting the boxes on the designer it lets you know what the current item selection is. A drop-down list shows all the elements that make up your Badges.

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

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Use these keywords in any text box:

User Keywords

- **$FirstName$**, **$LastName$**, or **$FullName$:** Displays the name of the Attendee.
- **$Title$** & **$Company$:** Displays the Position and Company Name of the Attendee.
- **$PhoneNumber$**, **$Email$**, **$StreetAddress$**, **$City$**, **$State$**, & **$ZipCode$:** Displays additional information about the attendee.
- **$UserCustomFieldN$:** *(N=1-5)* Displays the custom fields you uploaded or entered for each attendee.
- **$Sessions$:** Displays a list of all sessions this attendee is registered to at this conference.
- **$Credits$:** Shows the total number of credits the Attendee received.

Conference Keywords

- **$Conference$:** Displays the name of the Conference.
- **$Date$:** Display the date of the Conference.

Selection Options

There are 4 options you can do when you have any of the above items (images, textboxes, etc.) selected.

1. **Move:** To do this click anywhere on the item. Once that item is selected then click and drag it anywhere on the canvas.
2. **Resize:** To do this simply click and drag the gray arrow located on the bottom-right corner of the box. ***Note:*** *you cannot make the box larger than the canvas size.*
3. **Edit:** To do this you simply double-click the textbox or table and this will allow you to change the text. ***Note:*** *Images do not have this option as they have this option in their properties. Additionally there is not an image editor in this designer so this means you'll have to edit the image outside of the* ***Conference Tracker*** *website before uploading them.*
4. **Remove:** Simply click the red ball in the top-right corner of the box.

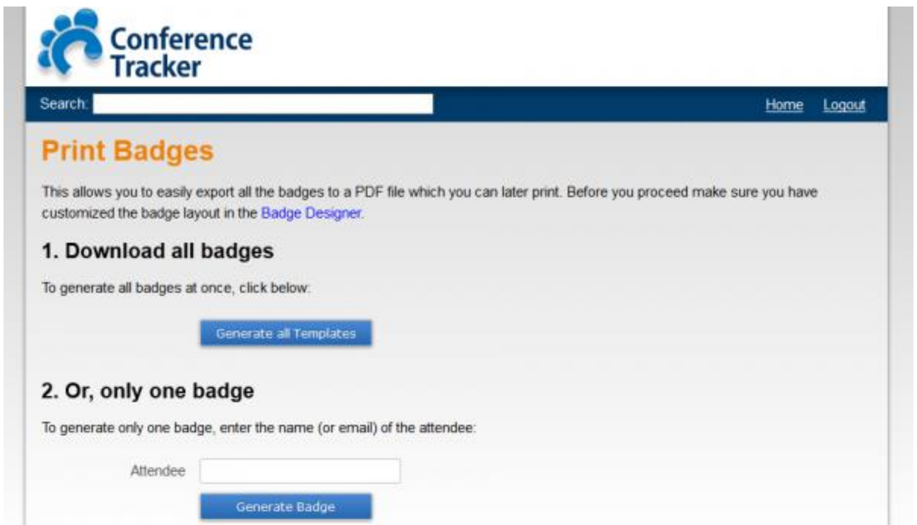
Finalize the design

Be sure to click the **Save** button at the bottom of the page when done editing or click the **From Templates** button to start over.

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.

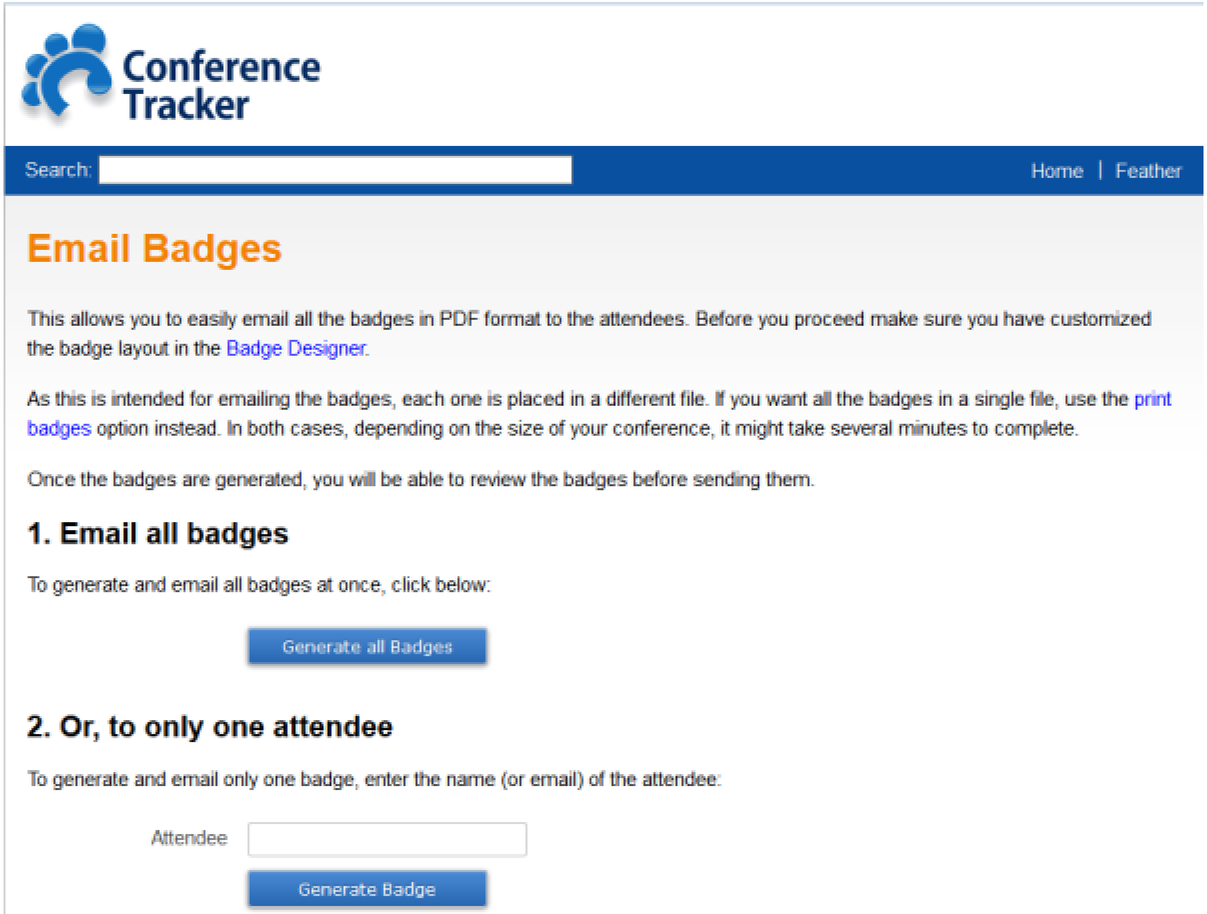
The Avery part number for badges that you need is #5392 and uses template number #74541. They are 3” x 4” badge inserts (6 to a page) and can be found at Avery.com by clicking here or at retailers carrying Avery products.

Email

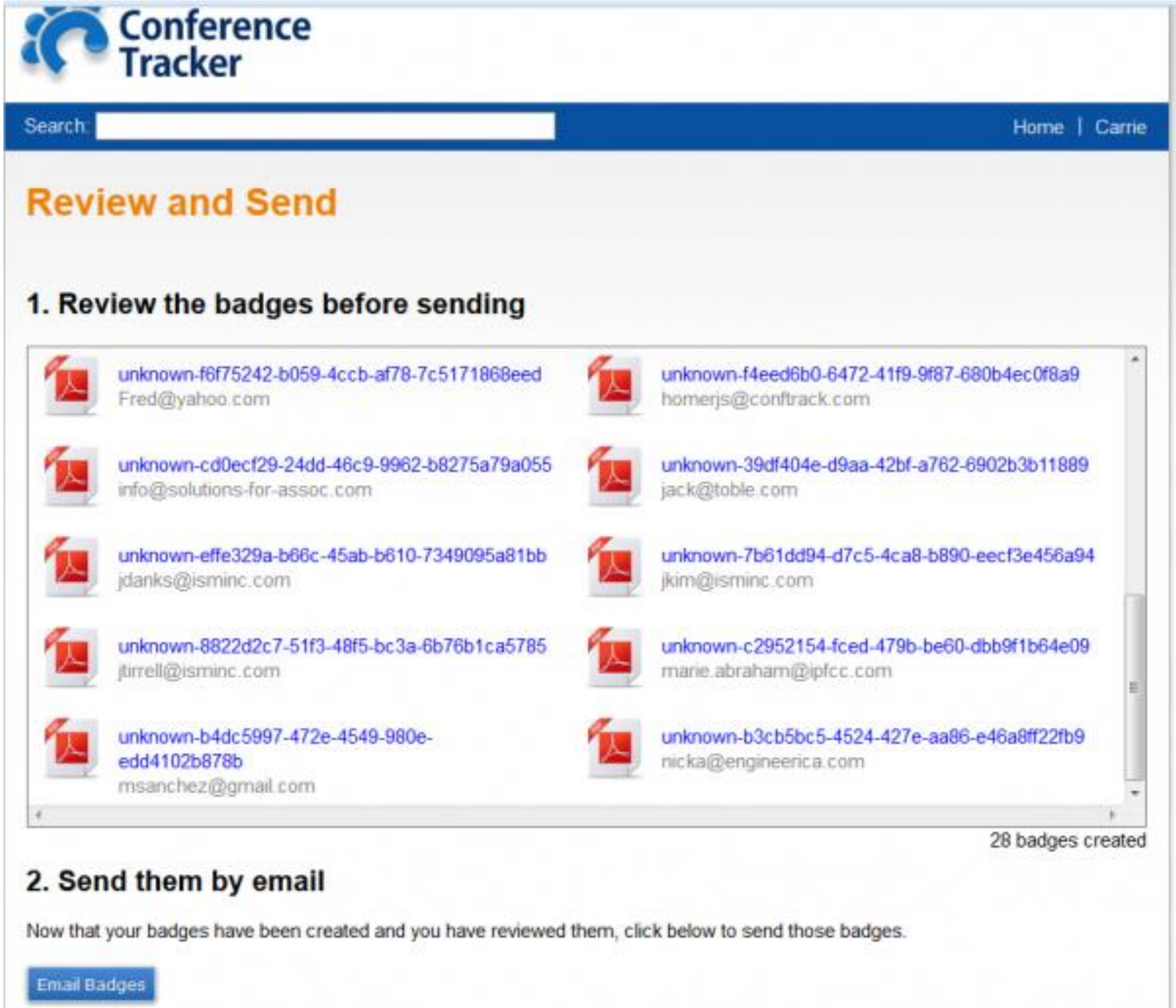
If you prefer to email the badges to the attendees you can email them individually or send the badges out all-at-once for the Attendee(s) to print. This may save you on some printing costs so you only have to print the badges that people forgot or misplaced at the conference.

- 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** button 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.

Print QR Labels

This is an option for those who already have their own badges but do not have barcodes on them to scan. Typically these are printed out and attached to the back of the badge. In this section it produces a printable sheet of 24 QR codes on 1-1/2" x 1-1/2" squares with the names and card numbers of each **Attendee**. Recommended printing with *Avery® Easy Peel® White Square Labels 22805, 1-1/2" x 1-1/2", Pack of 600*.

To quickly print all the **Attendees'** QR labels click the **Print** button. You can also filter based on individual **Attendees** or **Workshop Registration** to get only the labels you want.

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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:

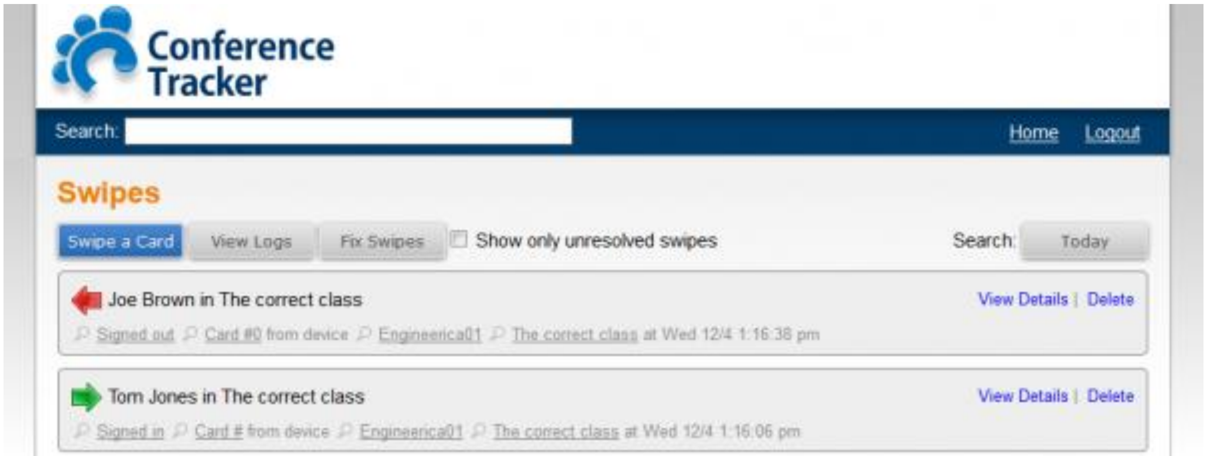
- **Attendee:** Displays the name of the attendee
- **Workshop:** Displays the session (workshop) where the attendee has signed in.
- **Sign-In Date:** Displays the date of the attended session.
- **Time:** Displays the time of the sign in.

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

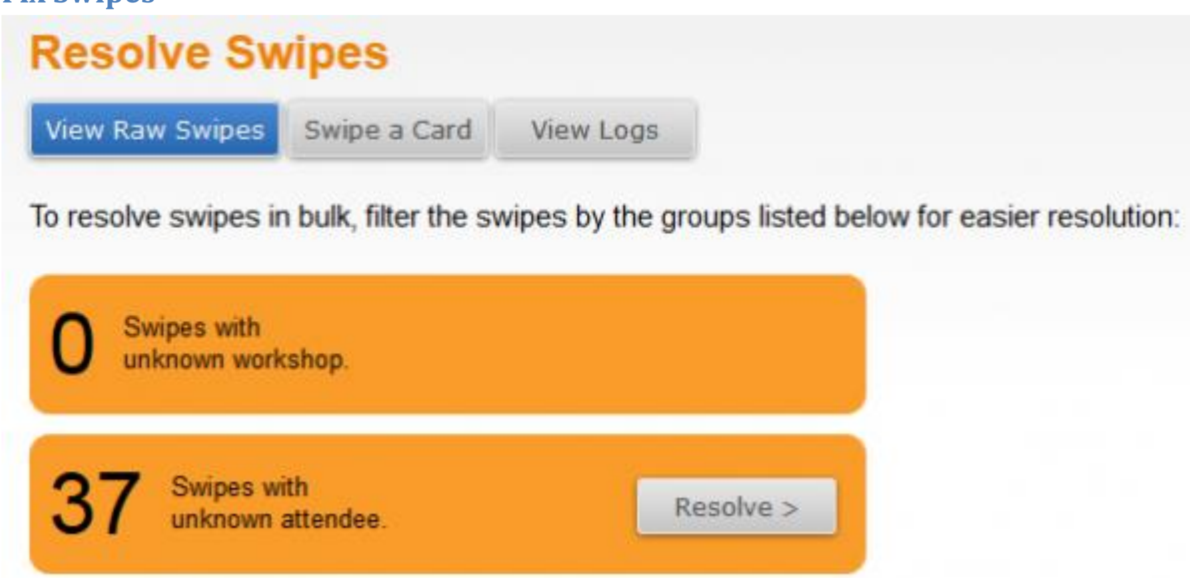


This screen displays the made swipes. A “Missing data” is displayed when an unknown attendee made a swipe in a workshop or a Room. You can place a check in the box next to **“Show only unresolved swipes”** to view all of the swipes that are “Missing data” or “Unresolved” at the moment. An operator can 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 and 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



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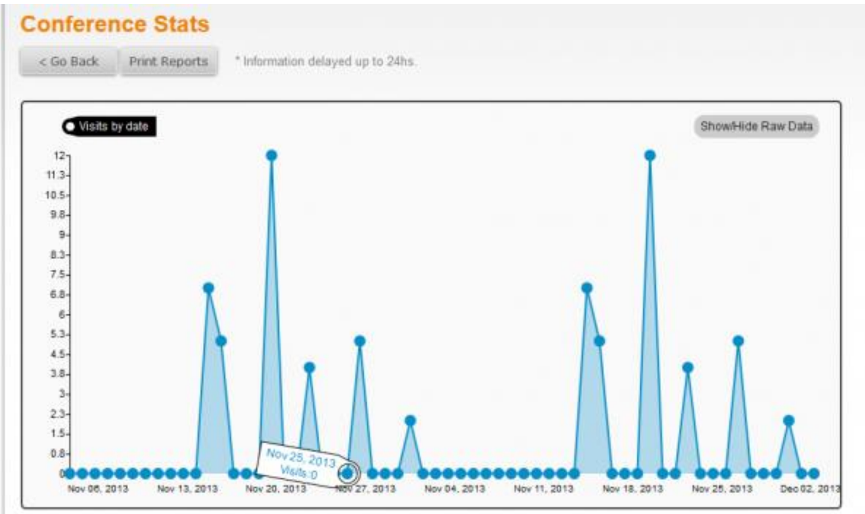
Conference Analytics

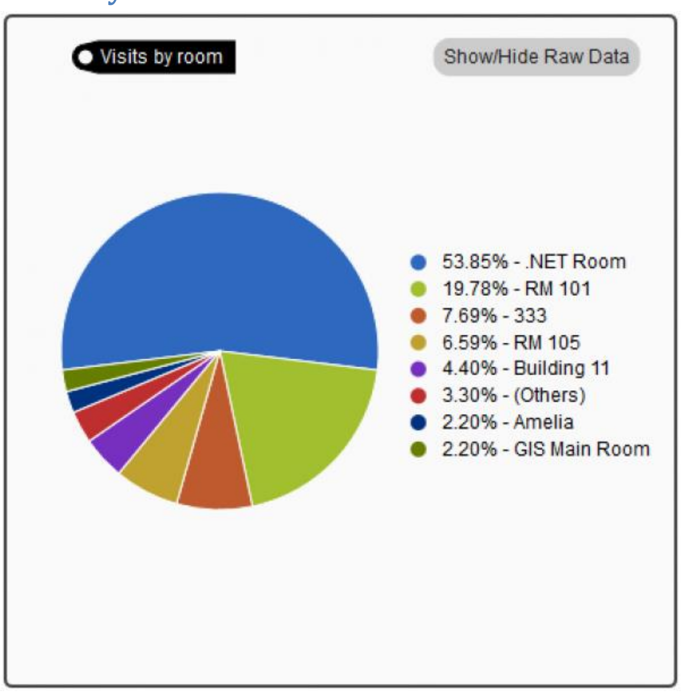
This is a great tool to analyze the effectiveness of your workshops based on the volume of Attendees participating in the workshops. This may also help to determine what days or times of the day during the conference were the busiest in order to staff more Operators or Administrators to help. This may 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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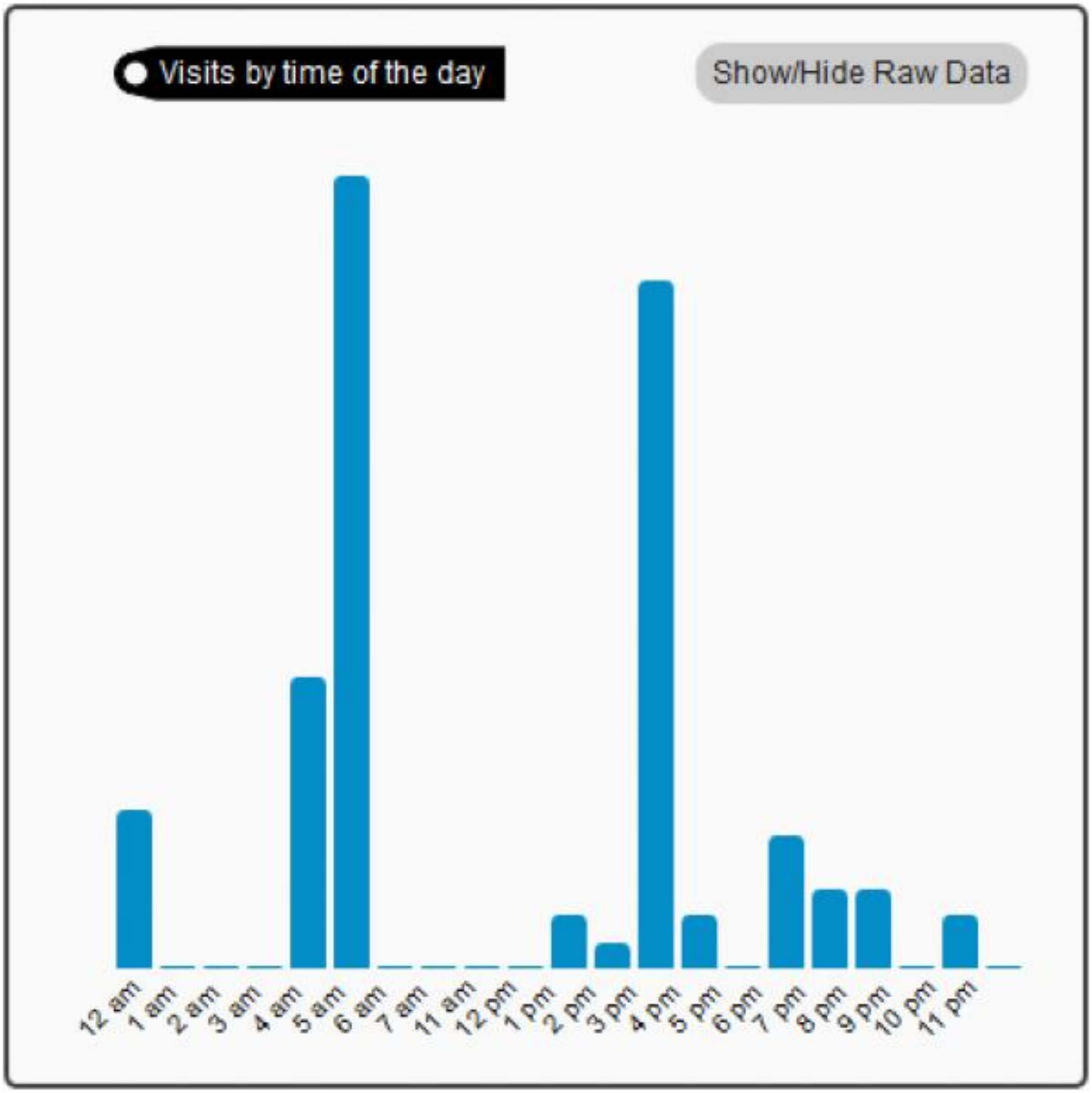
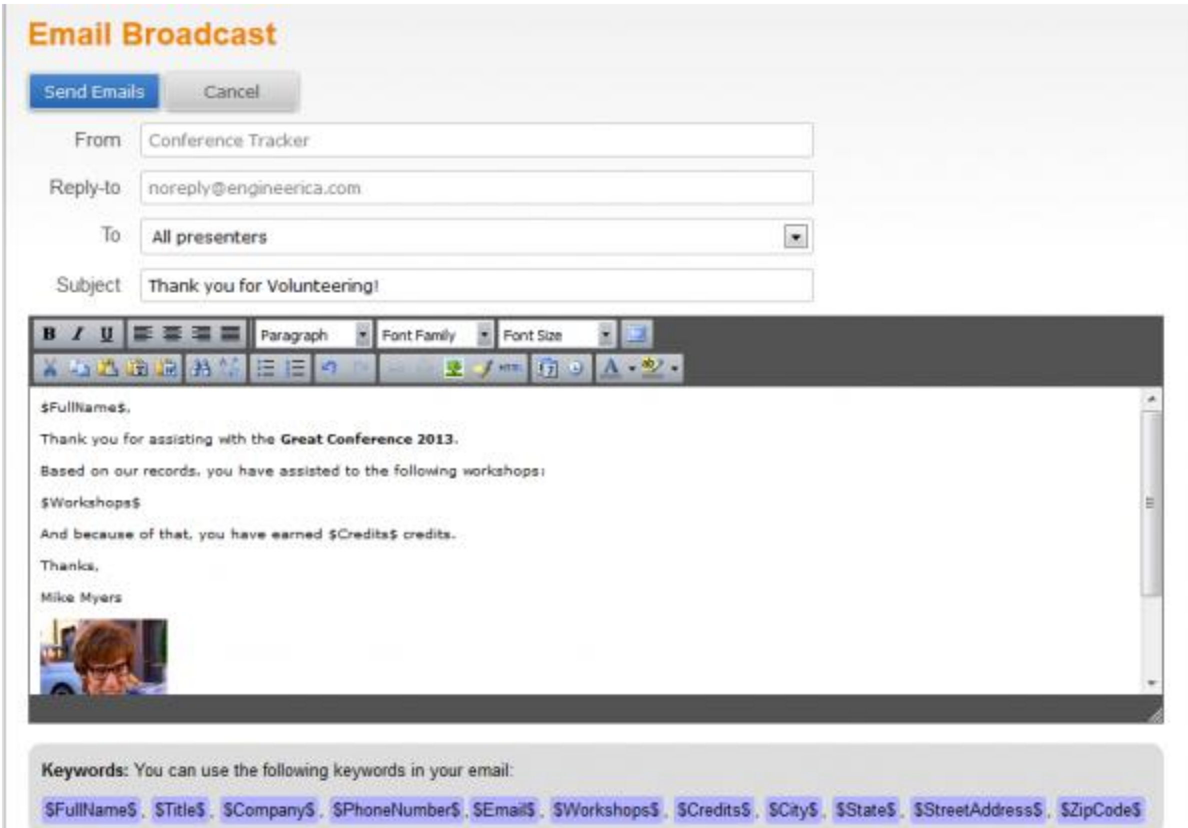
Visits by Time of Day



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:

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

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.

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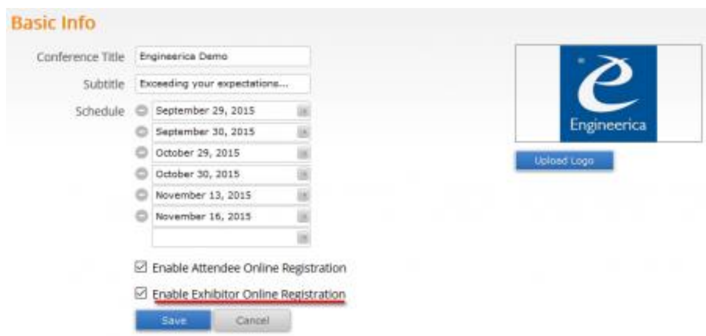
Online Exhibitor Registration

This is where you can create the registration form for the exhibitors to fill-out and also approve the exhibitors 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.



Create/Edit Registration Form

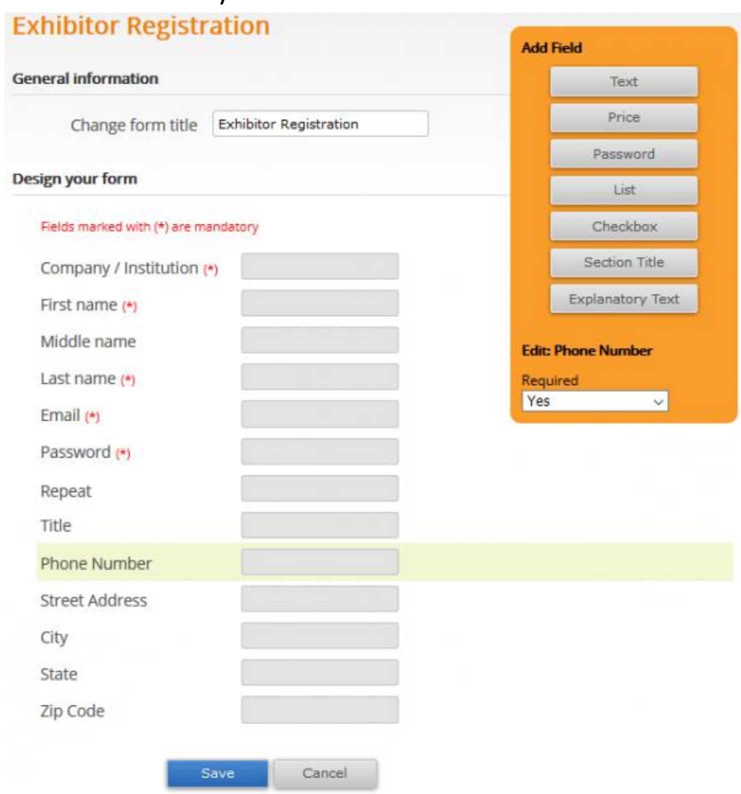
If you have already enabled Online Registration you can now edit your registration form by clicking the **Edit Registration Form** button. Here you can add your own custom fields in addition to the default fields in the system. There are 7 types of fields:

1. **Textbox** - The purpose of this item is simply if you want to get a text response from the registrant.
   - Properties:
     - **Required** - Use this option to make a response required (Yes) or optional (No).
2. **Price** - The purpose of this item is to allow your registrant to add any price value to their final payment (Typically used for donations).
   - Properties:
     - **Required** - Use this option to make a response required (Yes) or optional (No).
3. **Password** - This item is basically a text box that hides the characters and could be used to hide sensitive information. Note: You'll get 2 fields so the user will have to verify the information.
   - Properties:
     - **Required** - Use this option to make a response required (Yes) or optional (No).
     - **Minimum length** - Use this option to set the minimum length required for the password.
4. **Listbox** - The purpose of this item is to allow the registrant to select one or multiple item(s) from a list of options. Note: You can now add prices to these options to be tallied on final payment.
   - Properties:
     - **Required** - Use this option to make a response required (Yes) or optional (No).

- **Multiple selection** - Use this option if you want the registrant to have more than one selection.
- **Allow Prices per Option** - Use this option if you want to associate prices with each list item that will be added to their final payment.

5. **Checkbox** - The purpose of this item is to allow the registrant to check a box on the registration form (typically used to confirm consent).
   - Properties:
     - **Required** - Use this option to make a response required (Yes) or optional (No).
6. **Section Title** - The purpose of this item is to separate portions of the form with headings.
7. **Explanatory Text** - The purpose of this item is to provide additional information to registrants while they are completing the form.

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 you are done with the **Save** button at the bottom of the form.



Registration Options

The other options aside from editing the registration form you have here allow you quickly confirm all registrations using the **Confirm All** button and the Share Option.

Confirm All

Confirm All could possibly be used if you want to quickly add every received registration form regardless of its phase. This will make more sense after reading **The Registration Process** section below.

Share

This area allows you to get iframe html code to add the registration form to your own website, offers quick Social Media options to share information about registering for the conference, and finally a direct link that you can e-mail to possible exhibitors so they can register for the conference.

Send Payment Instructions

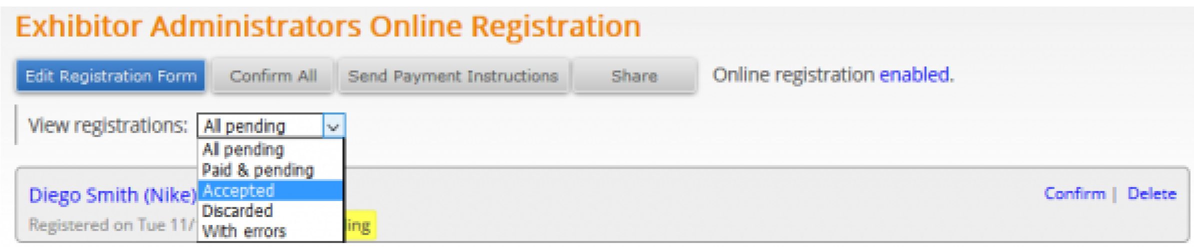
Use this button to send all the pending exhibitors the payment URL/information to complete the process through PayPal. This is only necessary if you are using PayPal through **Conference Tracker** and online payments are activated.

The Registration Process

This area can get confusing for first time users so this next section is here to help clarify the process of exhibitors registering for the conference.

The next topic to discuss is the life-cycle of a registration goes through several phases in this order:

1. **Pending** or **With Error**
2. **Paid & Pending** (Can be skipped if you set to auto-accept paid registrations.)
3. **Accepted** or **Discarded**.



Pending or With Error

Pending

This means that the **Attendee** has filled out the registration form but it has not been approved. This phase is when the attendee has not paid for the Conference. From here you can select the option on the Attendee's line to "Send Payment Instructions" as pictured above.

With Error

These are the registration forms that have been completed with errors. Several examples may be the e-mail address was formatted incorrectly like "mi ke@abc.com" or the phone number is missing a digit like "407-555-555_". Here you'll have the ability to make these corrections.

Paid & Pending

Exhibitors will only show up in this phase if "Auto-accept when payment received" is not turned on in the conference settings. Here you can manually accept the exhibitors who've paid their registration fees.

Accepted or Discarded

These are lists of all the Accepted Registrations and Discarded ones you chose to delete.

Accepted

This is a list of all the Accepted Registrations.

Discarded

This is a list of all the Registrations Discarded you chose to delete.

You can look at each of these using the drop-down box labeled *View* in the top right of the Online Registration screen (pictured in the screenshot above).

Exhibitor Administrators

This is where you can manage your **Exhibitor Administrators** information.

Create: Simply click the **Create New** button at the top of this screen.

Edit: Click on the name of the Administrator you would like to edit.

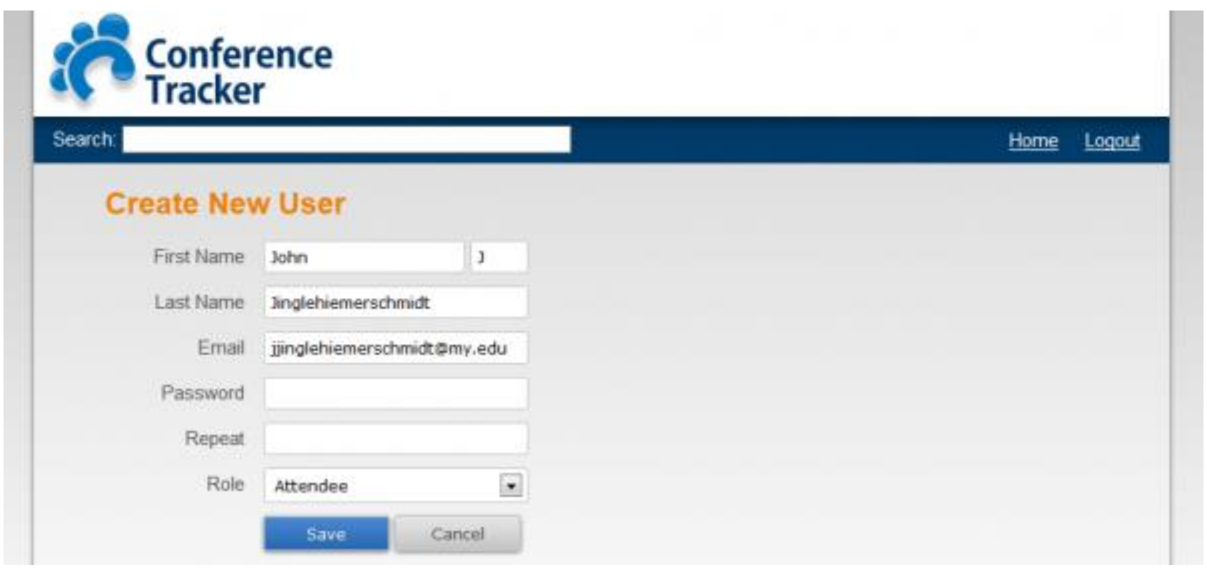
Delete: Click the **Delete** link on the far right side of the bar. Then click the **OK** button to confirm.

If you accidentally clicked the **Delete** link click the **Cancel** button to go back.

View Limits: Click the **View Limits** link to see exactly how many exhibitor representatives they are planning of having attend or are allowed according to the number of exhibitors registered. As well if they purchased the **Conference Leads** app through the **Online Conference Registration** you'll see how many license they paid to use.

Exhibitor Representatives

You can manually create new exhibitors any time you want! This can be especially helpful if you need to add them because they were not on your original imported CSV file. 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.

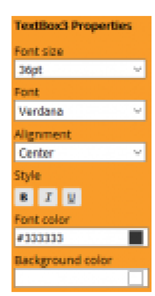
Design Your Certificate

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

Size and Orientation: This option allows you to change the certificate from “Portrait” to “Landscape” using “A4” or “Letter” sizes.



Add Text Button: Create a box where you can enter text.
Font Size: Adjust the size of the text.
Font: Adjust the type of the font used in the textbox.
Alignment: Aligns the text with in the box area you draw.
Style: Bold, *Italic*, and *Underline* options.
Font Color: Adjust the color of the text.
Background Color: Adjust the background color of the textbox area.

Add Image Button: To add images to canvas the certificate.

View Original: This opens the image in a separate tab/window so you can see the original size/image.
Select: Use to select the location and file of the image you want to insert.
None: Use this to remove all images from the image box.
Select Control This is used to select a part of the **Certificates** you want to edit and if selecting the boxes on the designer it lets you know what the current item selection is. 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.
Use these keywords in any text box:
User Keywords
$FirstName$, **$LastName$**, or **$FullName$:** Displays the name of the Attendee.
$Title$ & **$Company$:** Displays the Position and Company Name of the Attendee.
$PhoneNumber$, **$Email$**, **$StreetAddress$**, **$City$**, **$State$**, & **$ZipCode$:** Displays additional information about the attendee.
$UserCustomFieldN$: *(N=1-5)* Displays the custom fields you uploaded or entered for each attendee.
$Workshops$: Displays a list of all workshops this attendee went to at this conference.
$Credits$: Shows the total number of credits the Attendee received.
Conference Keywords
$Conference$: Displays the name of the Conference.
$Date$: Display the date the certificate was earned.

Selection Options

There are 4 options you can do when you have any of the above items (images, textboxes, etc.) selected.

Move: To do this click anywhere on the item. Once that item is selected then click and drag it anywhere on the canvas.
Resize: To do this simply click and drag the gray arrow located on the bottom-right corner of the box.
Note: *you cannot make the box larger than the canvas size.*
Edit: To do this you need to double-click the textbox or table and this will allow you to change the text.
Note: *Images do not have this option as they have this option in their properties. Additionally there is not an image editor in this designer so this means you'll have to edit the image outside of the* ***Conference Tracker*** *website before uploading them.*
Remove: Simply click the red ball in the top-right corner of the box.

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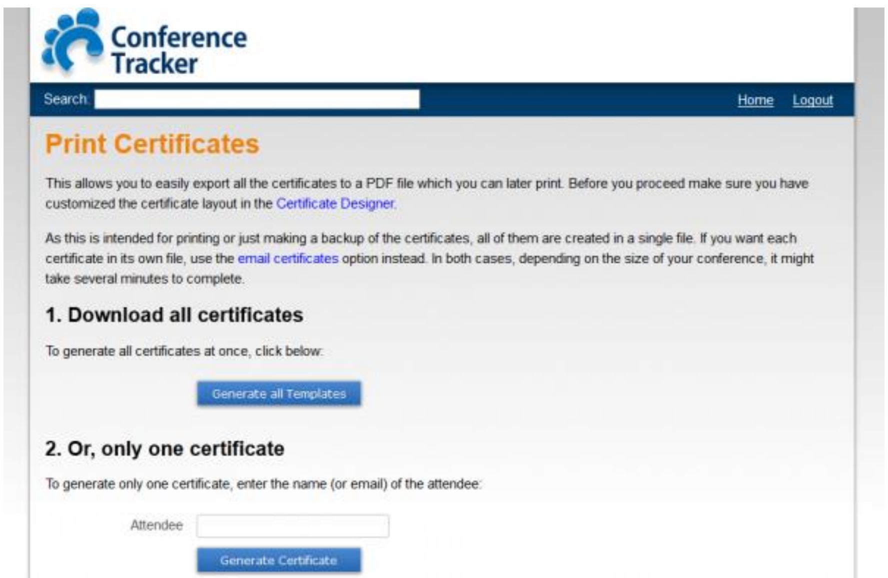
Finalize the design

Be sure to click the **Save** button at the bottom of the page when done editing or click the **From Templates** button to start over.

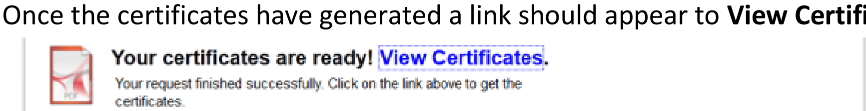
Print the Certificates

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**.



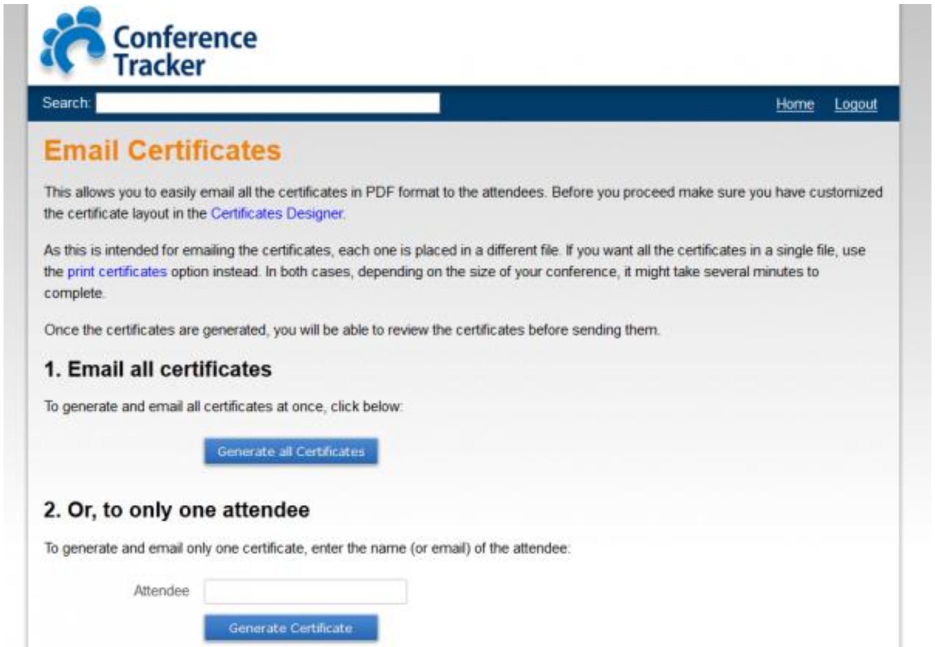
E-mail Certificates

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

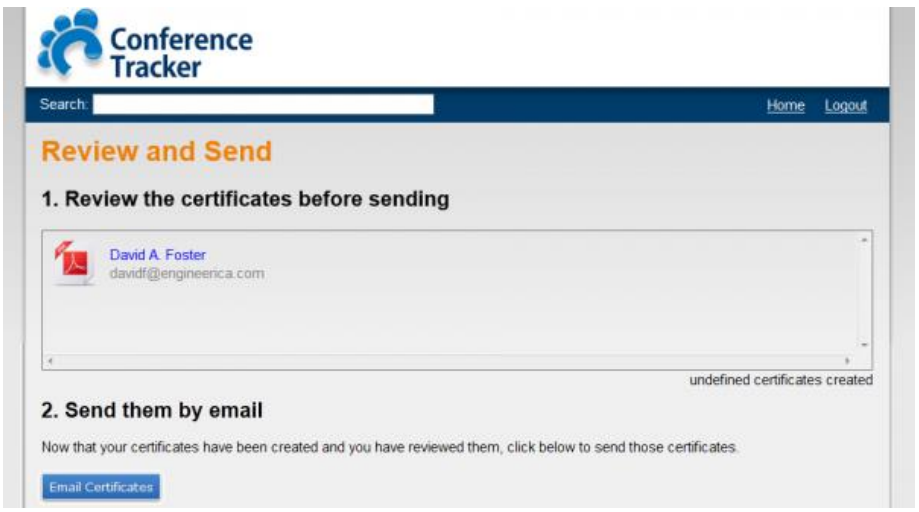
1. To e-mail all certificates, click on Generate all Certificates
2. To send to a single Attendee must type the name of the person. Then click on Generate Certificate.

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.

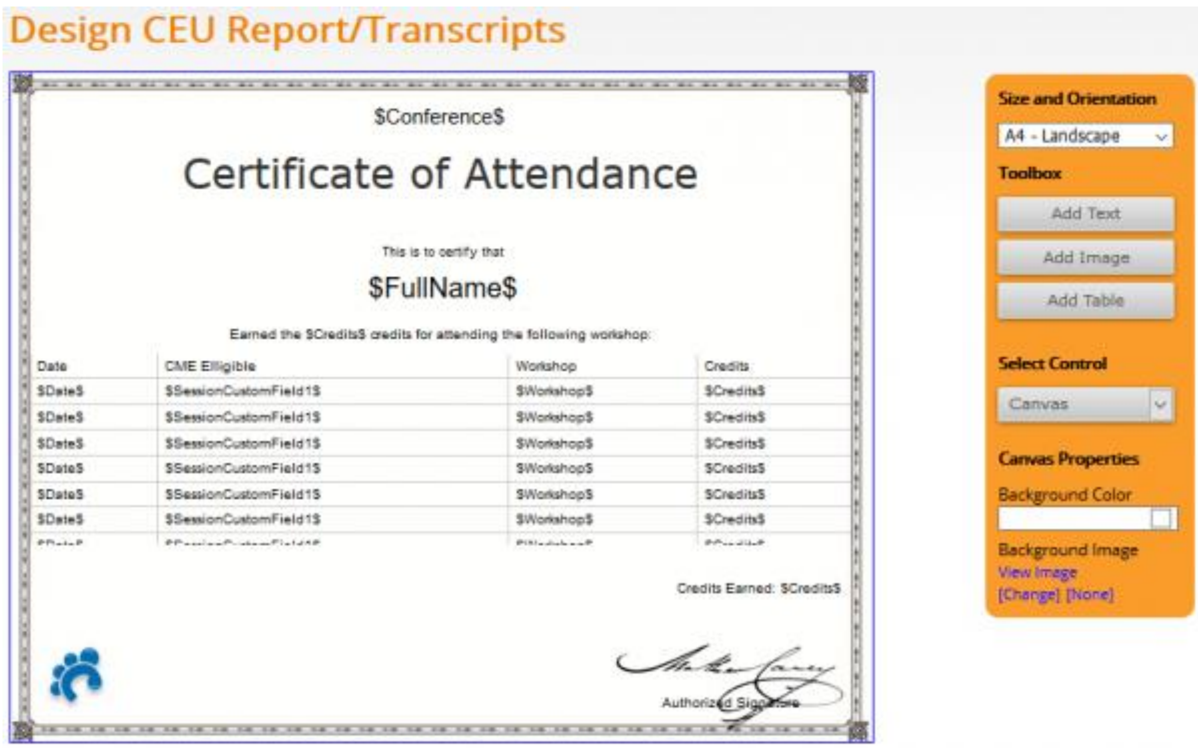
CEU Transcripts

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

Design Your CEU Transcripts

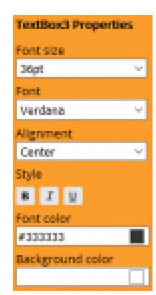
How to Access: CEU Transcripts > **Design**

This is where you can fully customize your Attendees **CEU Transcripts** or just choose from several preset templates. If you don't like any of them simply click the **None** option at the bottom.



On this screen you can design the **CEU Transcripts** for your Attendees. Using the following sections:

Toolbox



- **Size and Orientation:** This option allows you to change the transcript from "Portrait" to "Landscape" using "A4" or "Letter" sizes.
- **Add Text Button:** Create a box where you can enter text.
    - **Font Size:** Adjust the size of the text.
    - **Font:** Adjust the type of the font used in the textbox.
    - **Alignment:** Aligns the text with in the box area you draw.
    - **Style: Bold**, *Italic*, and *Underline* options.
    - **Font Color:** Adjust the color of the text.
    - **Background Color:** Adjust the background color of the textbox area.
- **Add Image Button:** To add images to canvas the transcript.
    - **View Original:** This opens the image in a separate tab/window so you can see the original size/image.
    - **Select:** Use to select the location and file of the image you want to insert.
    - **None:** Use this to remove all images from the image box.

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- **Add Table Button:** To add images to canvas the transcript.
    - **Font Size:** Adjust the size of the text.
    - **Font:** Adjust the type of the font used in the textbox.
    - **Alignment:** Aligns the text with in the box area you draw.
    - **Font Color:** Adjust the color of the text.
    - **Background Color:** Adjust the background color of the textbox area.
- **Select Control** This is used to select a part of the **CEU Transcripts** you want to edit and if selecting the boxes on the designer it lets you know what the current item selection is. A drop-down list shows all the elements that make up your transcript.
- **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 transcript created.
        - **Change:** You can upload an image that resides on your computer.
        - **None:** Removes any background image upload.

Use these keywords in any text box:

User Keywords

- **$FirstName$**, **$LastName$**, or **$FullName$:** Displays the name of the Attendee.
- **$Title$** & **$Company$:** Displays the Position and Company Name of the Attendee.
- **$PhoneNumber$**, **$Email$**, **$StreetAddress$**, **$City$**, **$State$**, & **$ZipCode$:** Displays additional information about the attendee.
- **$UserCustomFieldN$:** *(N=1-5)* Displays the custom fields you uploaded or entered for each attendee.
- **$Workshops$:** Displays a list of all workshops this attendee went to at this conference.
- **$Credits$:** Shows the total number of credits the Attendee received.

Conference Keywords

- **$Conference$:** Displays the name of the Conference.
- **$Date$:** Display the date the transcript was earned.

Use these keywords in the transcript table:

Transcript Keywords

- **$Date$:** Displays the date of the relative workshop that the credits were earned.
- **$Workshop$:** Displays the name of the relative workshop that the credits were earned.
- **$Credits$:** Shows the number of credits the Attendee received in relation to the workshop.
- **$SessionCustomFieldN$:** *(N=1-5)* Displays the custom fields you uploaded or entered for each workshop.

To edit what columns appear in the table simply double-click the table and edit them. The column definitions will look something like this:

Date = $Date$

CME Eligible = $SessionCustomField1$

Workshop = $Workshop$

Credits = $Credits$

Selection Options

There are 4 options you can do when you have any of the above items (images, textboxes, etc.) selected.

1. **Move:** To do this click anywhere on the item. Once that item is selected then click and drag it anywhere on the canvas.
2. **Resize:** To do this simply click and drag the gray arrow located on the bottom-right corner of the box. ***Note:*** *you cannot make the box larger than the canvas size.*
3. **Edit:** To accomplish this you double-click the textbox or table and this will allow you to change the text. ***Note:*** *Images do not have this option as they have this option in their properties. Additionally there is not an image editor in this designer so this means you'll have to edit the image outside of the* ***Conference Tracker*** *website before uploading them.*
4. **Remove:** Simply click the red ball in the top-right corner of the box.

Finalize the design

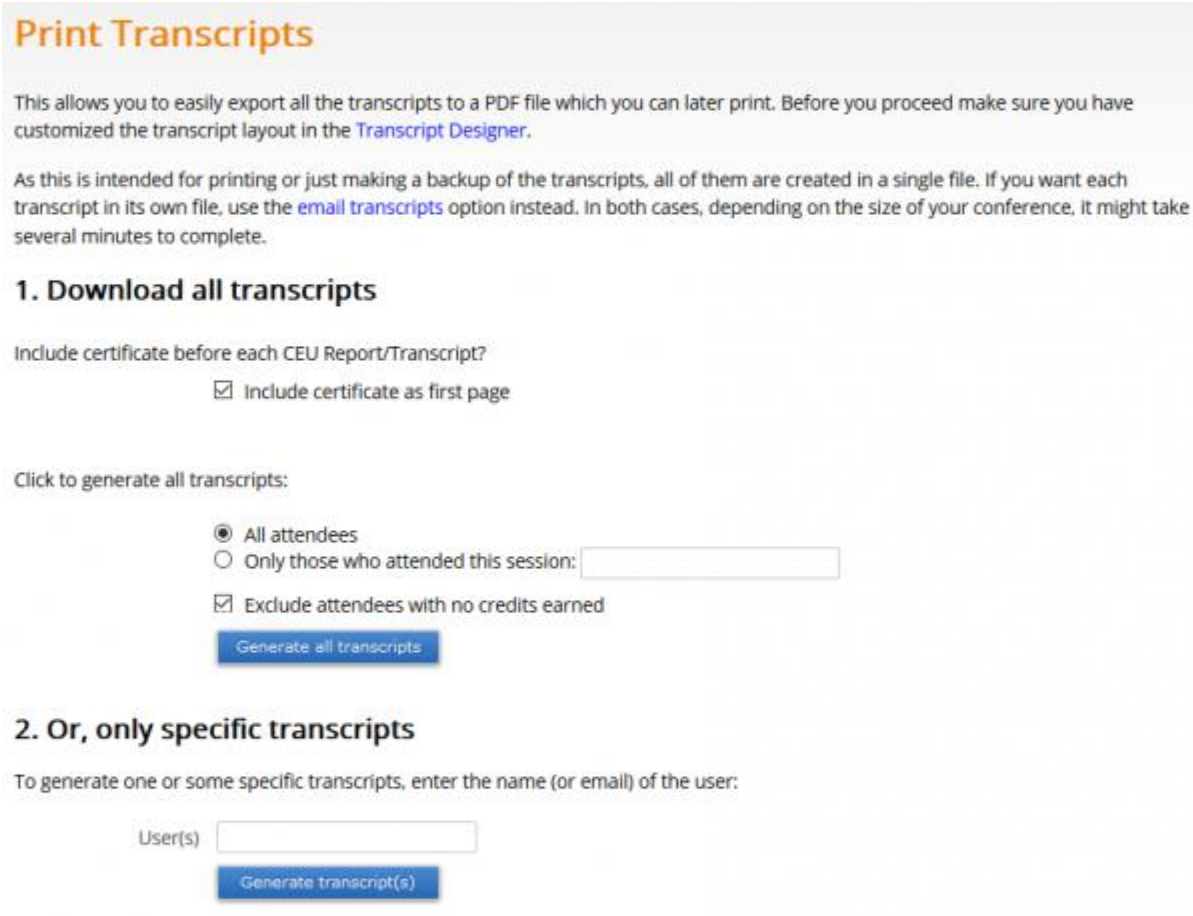
Be sure to click the **Save** button at the bottom of the page when done editing or click the **From Templates** button to start over.

Print the CEU Transcripts

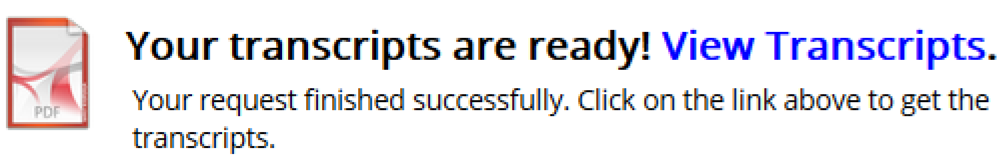
How to Access: CEU Transcripts > **Print**

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

- To print all **CEU Transcripts** click on **Generate all Transcripts** under section **Download all Transcripts** and wait until the bottom section of the screen with the message Your **CEU Transcripts** are ready, click on **View Transcripts** to download.
  - **Options:**
    - **Include certificate as first page:** This attaches a Certificate before each transcript in the printout.
    - **All Attendees** or **Print just a specified workshop:** This allows you to specify a single workshop to print the transcripts on.
    - **Exclude attendees with no credits earned:** This allows you to only get valid attendees who have attendance data.
- To print only a single transcript enter the name of the attendee and click on **Generate Transcript** under section **Or, only one transcript**. Then wait until the bottom section of the screen with the message Your **Transcripts are ready**, click on **View Transcripts** to download.



Once the **CEU Transcripts** have generated a link should appear to **View Transcripts**.



E-mail CEU Transcripts

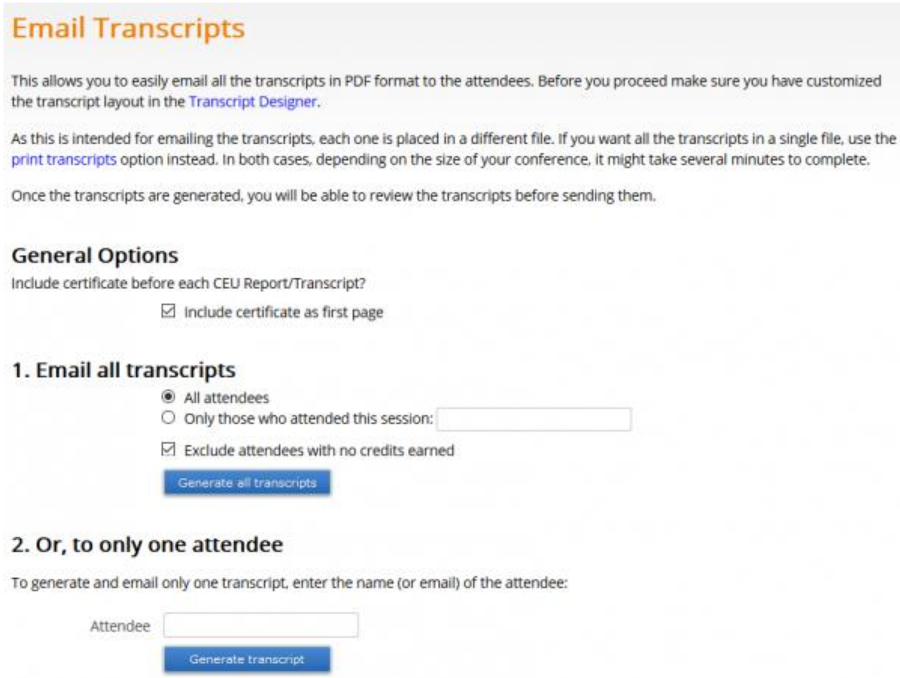
How to Access: CEU Transcripts > **Email**

You can send **CEU Transcripts** via email to multiple or a single Attendee.

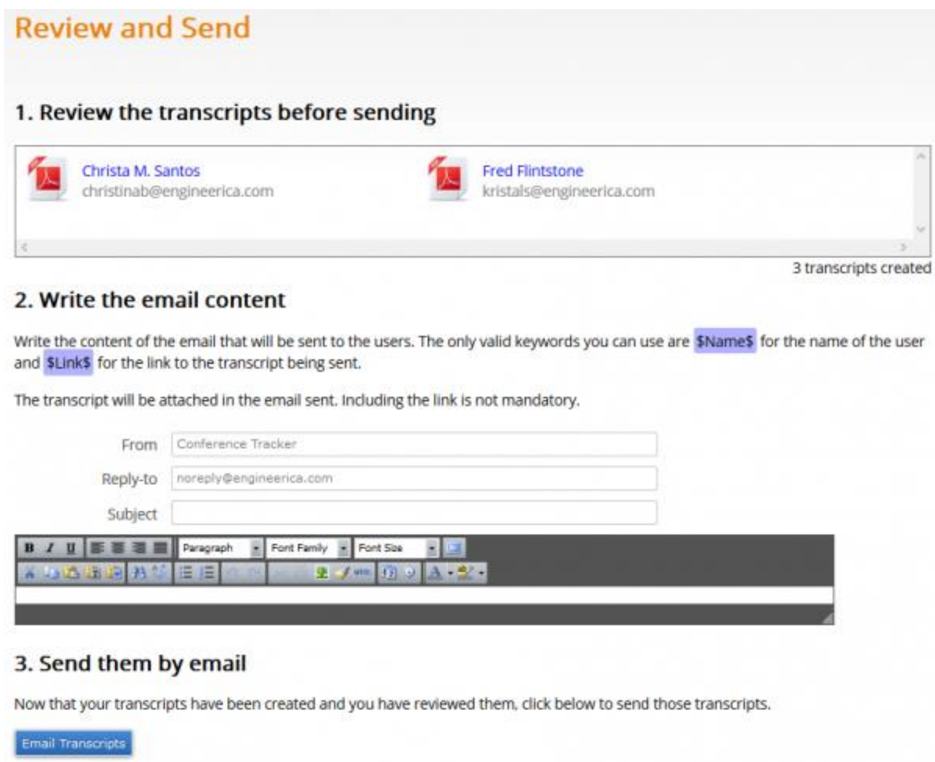
1. To e-mail all **CEU Transcripts** , click on **Generate all CEU Transcripts**
2. To send to a single Attendee must type the name of the person. Then click on Generate Transcript.

For both forms to send the **CEU Transcripts** you need to follow the final steps where you can review the transcript and send.

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



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



Once you hit **Email CEU Transcripts** the **CEU Transcripts** 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 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 **Administrators**, **Operators**, **Presenters** you need to specify the following headers:

Required:
FirstName, **MiddleInitial**, **LastName**, **Email**
Optional:
City, **State**, **Address**, **ZipCode**, **PhoneNumber**, **Title**, **Company**, **CustomField1**, **CustomField2**, **CustomField3**, **CustomField4**, **CustomField5**

To import **Exhibitor Administrators** or **Exhibitor Representatives** you need to specify the following headers:

Required:
FirstName, **MiddleInitial**, **LastName**, **Email**, **Company**
Optional:
City, **State**, **Address**, **ZipCode**, **PhoneNumber**, **Title**, **CustomField1**, **CustomField2**, **CustomField3**, **CustomField4**, **CustomField5**

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

Required:
FirstName, **MiddleInitial**, **LastName**, **Email**
Optional:
CardNumber, **City**, **State**, **Address**, **ZipCode**, **PhoneNumber**, **Title**, **Company**, **CustomField1**, **CustomField2**, **CustomField3**, **CustomField4**, **CustomField5**

To import **Workshops/Sessions**, you need to specify the following headers:

Required:
Name, **StartTime**, **EndTime**, **Room**
Optional:
Description, **Credits**, **Speakers**, **Capacity**, **Fee**, **RequiresSignOut**, **RequiredPresencePctg**, **OnlineRegistration**, **CustomField1**, **CustomField2**, **CustomField3**, **CustomField4**, **CustomField5**

To import **Session/Workshop Registration**, you need to specify the following headers:

Required:
Session, **Email**

Administrators, Operators, Presenters Import

FirstName	MiddleInitial	LastName	Email	CustomField1
Winnie	T	Pooh	wpooh@contrac.com	5161
Roger		Rabbit	roger.rabbit@conftrac.com	8852
Donald		Duck	duck@conftrac.com	5461
Fred		Flintstone	fred@conftrac.com	5612
Homer	J	Simpson	homerjs@conftrac.com	9523

[Download the example file (.csv)]

Exhibitors Import

FirstName	MiddleInitial	LastName	Email	Company
Winnie	T	Pooh	wpooh@contrac.com	"Honey Corp."
Roger		Rabbit	roger.rabbit@conftrac.com	"Carrot Enterprises"
Donald		Duck	duck@conftrac.com	"Quack Inc."
Fred		Flintstone	fred@conftrac.com	"Thelma Rules Inc."
Homer	J	Simpson	homerjs@conftrac.com	"Springfield Corp."

[Download the example file (.csv)]

Attendees Import

FirstName	MiddleInitial	LastName	Email	CardNumber	CustomField1
Winnie	T	Pooh	wpooh@contrac.com	1089	C515
Roger		Rabbit	roger.rabbit@conftrac.com	1035	P952
Donald		Duck	duck@conftrac.com	6584	A511
Fred		Flintstone	fred@conftrac.com	1078	B512
Homer	J	Simpson	homerjs@conftrac.com	1812	L122

[Download the example file (.csv)]

Sessions/Workshops Import

Name	StartTime	EndTime	Credits	Room	Capacity	Fee	RequiresSignOut	RequiredPresencePctg	OnlineRegistration	CustomField1
Faster Design Decisions with Style Tiles	6/1/2012 10:00 am	6/1/2012 11:00 am	2	.NET Room	2000	197.95	yes	75	yes	FDC
Styles of Redesign	6/1/2012 11:00 am	6/1/2012 12:00 am	3	Mobility	5000	200.95	no	75	no	SOR
Rolling Up Our Responsive Sleeves	6/1/2012 11:00 am	6/1/2012 12:00 am	2	.NET Room	200	30.95	yes	80	yes	RUO
Mobile to the Future	6/1/2012 10:00 am	6/1/2012 11:00 am	2	Mobility	100	50	yes	55	no	MTF
The Future of CSS	6/1/2012 12:00 pm	6/1/2012 1:00 pm	1	.NET Room	450	0	no	20	yes	FOC

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 you're 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)'.

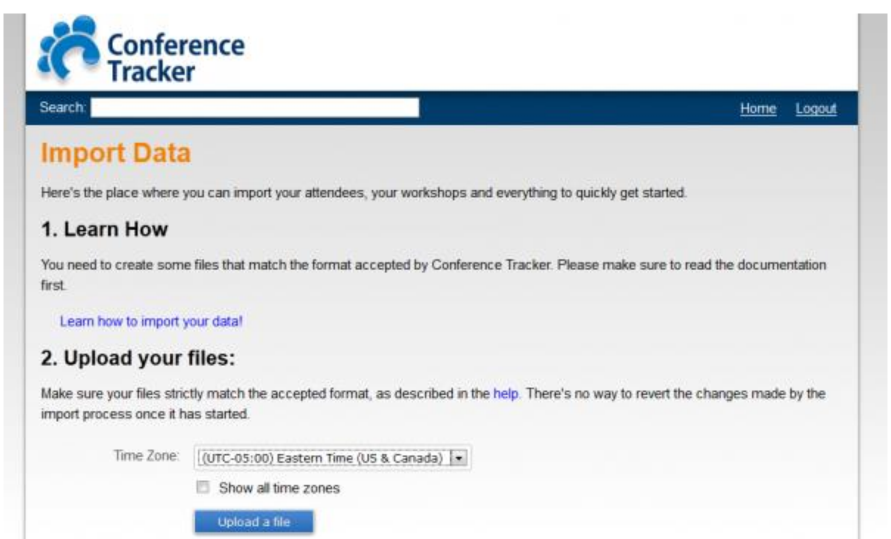
Sessions/Workshops Registration Import

Session	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

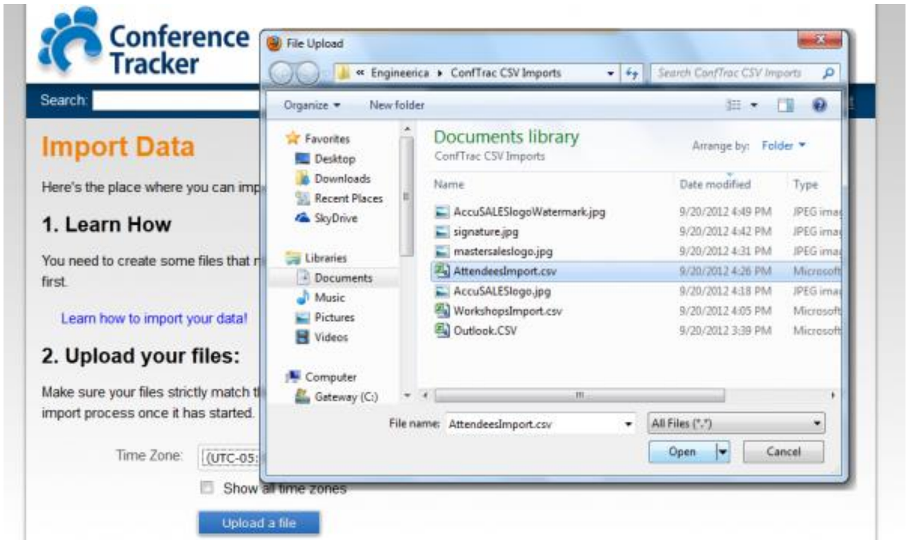
Download the example file (.csv)

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.

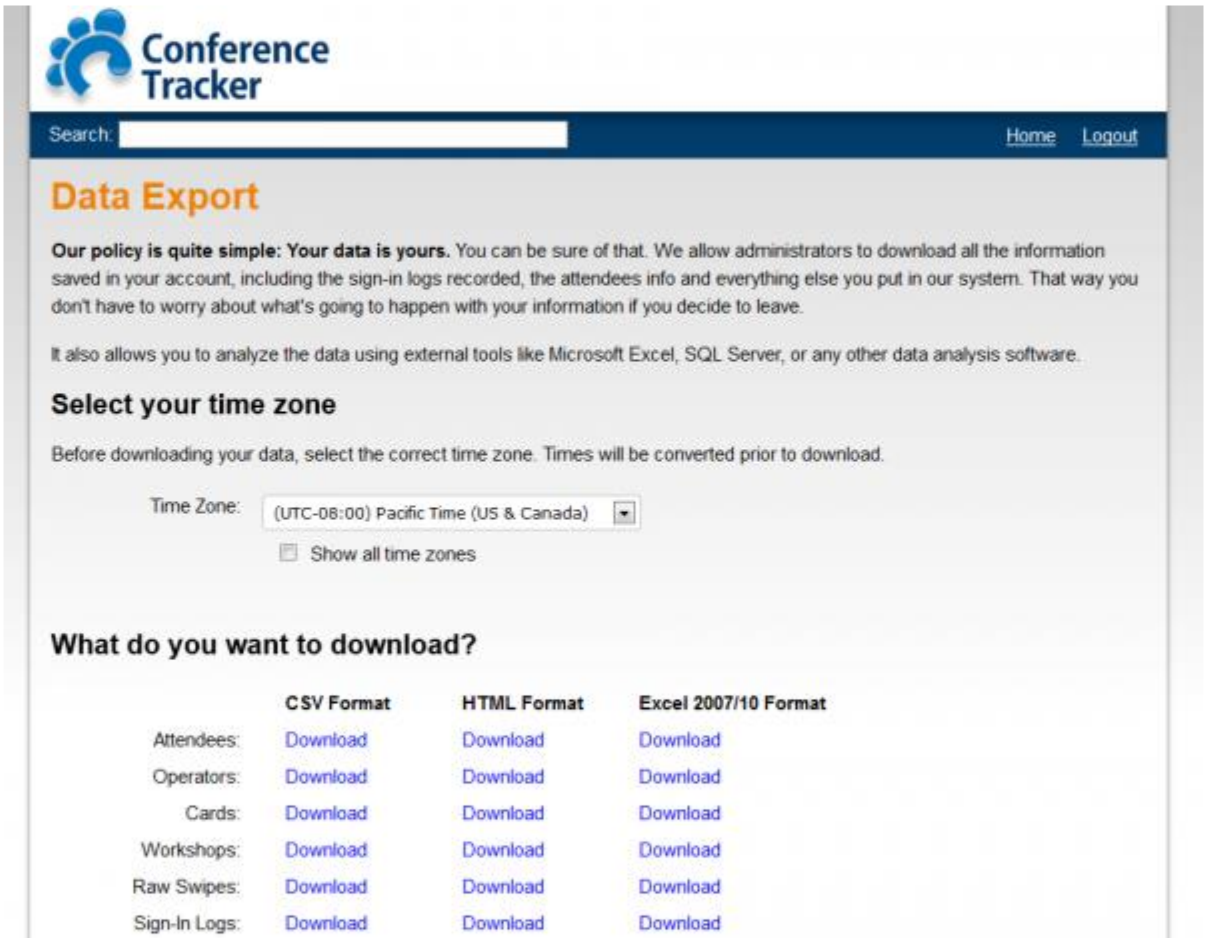


Browse your PC to find the CSV files and click open to upload and done!
A confirmation will be at the bottom of the screen.

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



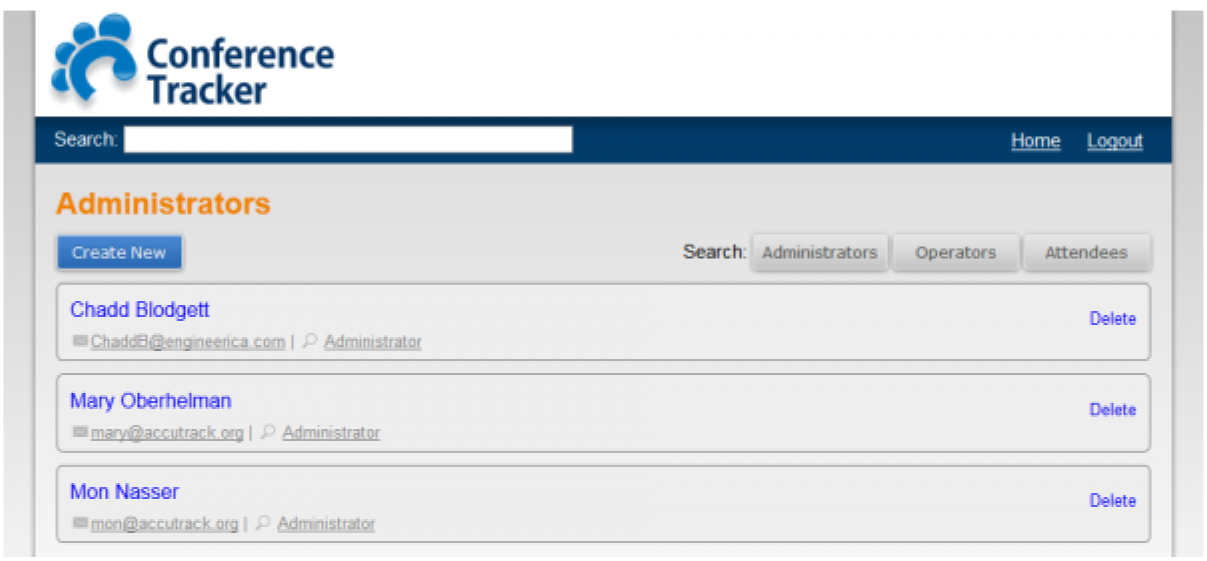
Tracking Conference has the ability to save your information to all the following file types - **CSV**, **HTML**, and an **Excel Spreadsheet**. To export click on Download and wait until it says your data is ready! Once again click on View Attendees which will let you download the file to your computer.

Companies

This is where you can see all the **Companies** information that's exhibiting at your conference.

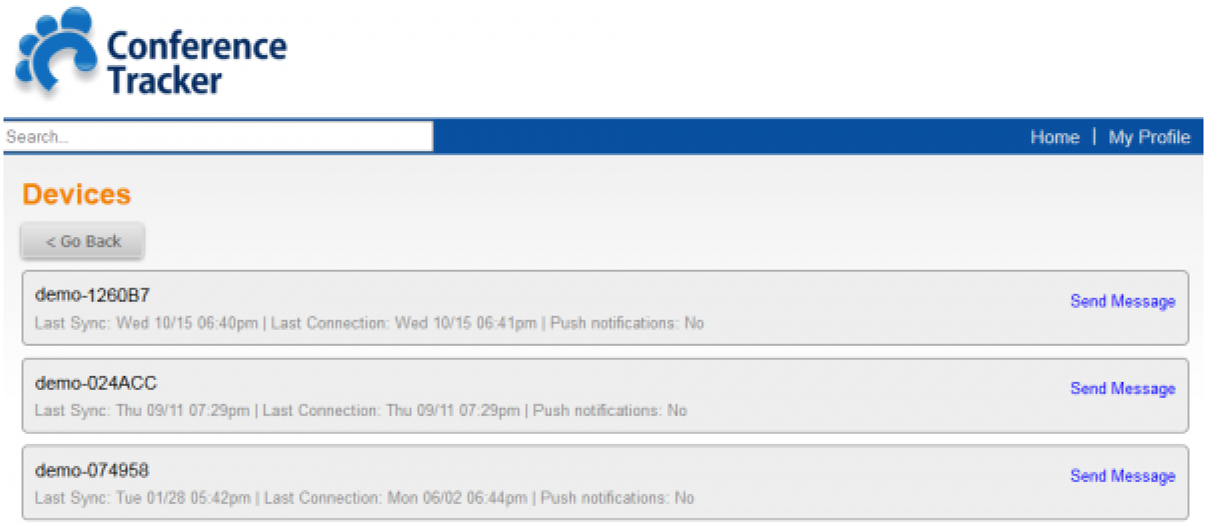
Administrators

This is where you can manage your administrator's information.



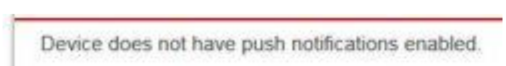
Device Messaging

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)]

Conference Tracker – Reference Manual

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.

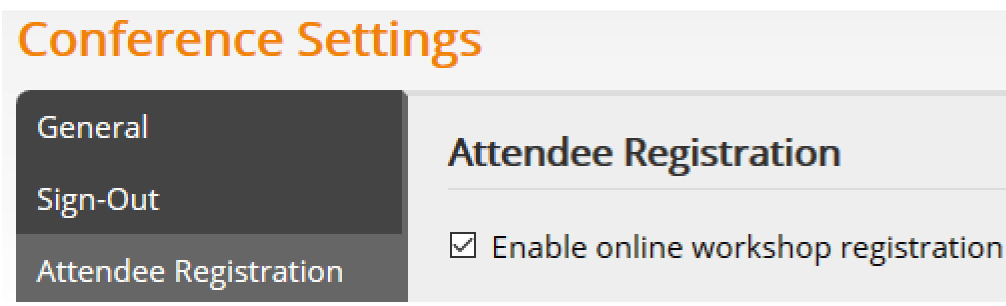
Required presence: It's a value between 1 and 100 indicating the percentage of time that users must be in a session to gain the credits.

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.

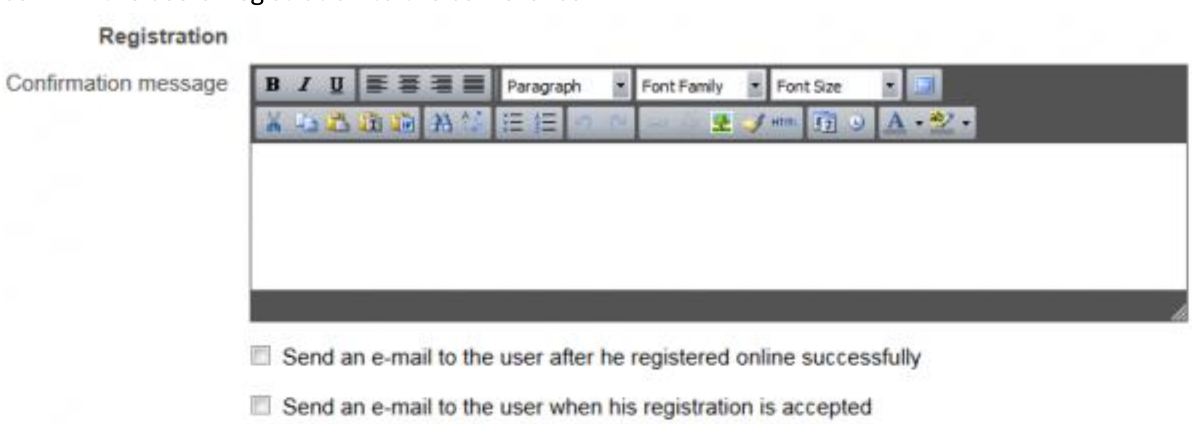
Attendee Registration

How to Access: Advanced Options > **Settings** > **Attendee Registration**

Enable online workshop registration: This allows your **Attendees** to select which workshops they would like to attend and also keeps a running count of registrations to let them know if a session has reached capacity.



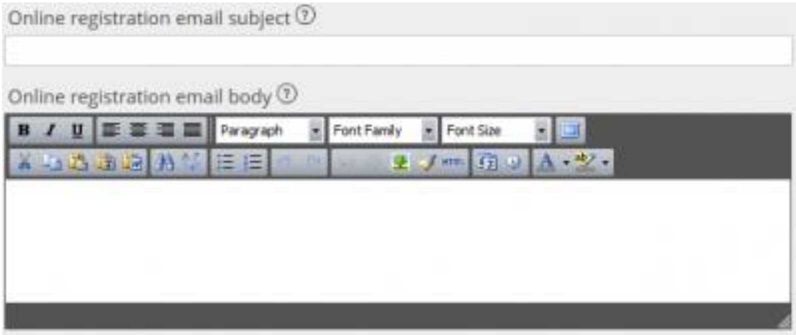
Confirmation Message: This is a brief message that you can complete using the word-like tools to confirm the users' registration to the conference.



Sending Options:

- Send an e-mail to the user after he registered online successfully
- Send an e-mail to the user when his registration is accepted (This opens an additional template to be sent specifically for this option).

If you choose either of the above **Email** options you'll be asked to customize the email subject and body of the message using the word-like editor below:

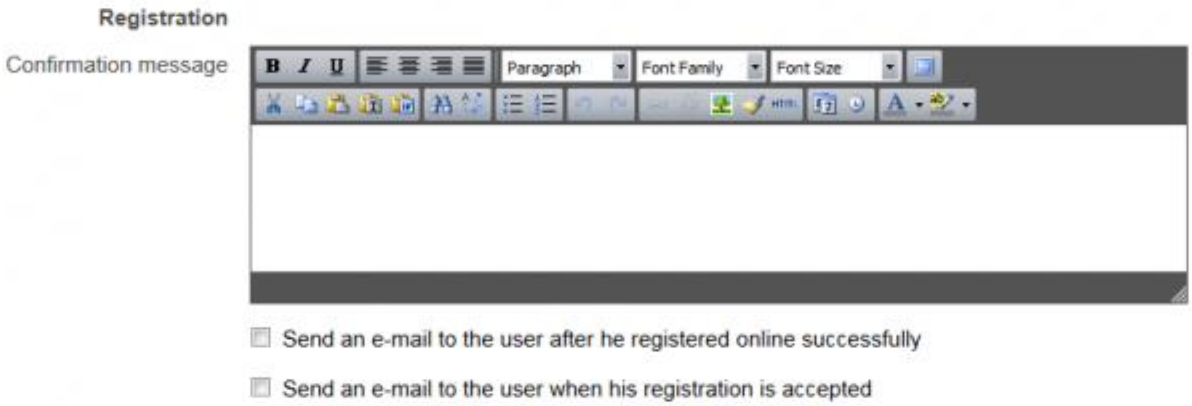


To add mail merge fields simply hover over the circled question mark symbol in the top right of each box to see what mail merge options you have available for that field ($Conference_Title$,$Conference_Subtitle$,$Conference_Schedule$, $Current_DateTime$, $Payment_Url$, and $Registration_Info$). Then simply type or copy them from above to see how helpful these are when trying to personalize the message.

Exhibitor Registration

How to Access: Advanced Options > Settings > Exhibitor Registration

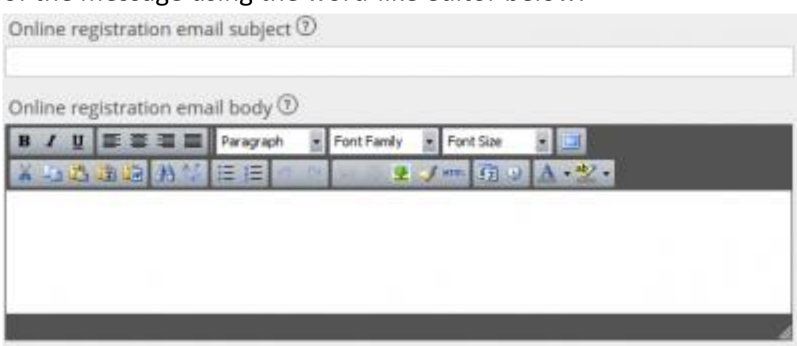
Confirmation Message: This is a brief message that you can complete using the word-like tools to confirm the users' registration to the conference.



Sending Options:

- Send an e-mail to the user after he registered online successfully
- Send an e-mail to the user when his registration is accepted (This opens an additional template to be sent specifically for this option).

If you choose either of the above **Email** options you'll be asked to customize the email subject and body of the message using the word-like editor below:



To add mail merge fields simply hover over the circled question mark symbol in the top right of each box to see what mail merge options you have available for that field ($Conference_Title$,$Conference_Subtitle$,$Conference_Schedule$, $Current_DateTime$, $Payment_Url$, and $Registration_Info$). Then simply type or copy them from above to see how helpful these are when trying to personalize the message.

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 sign-up 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.

Custom Fields

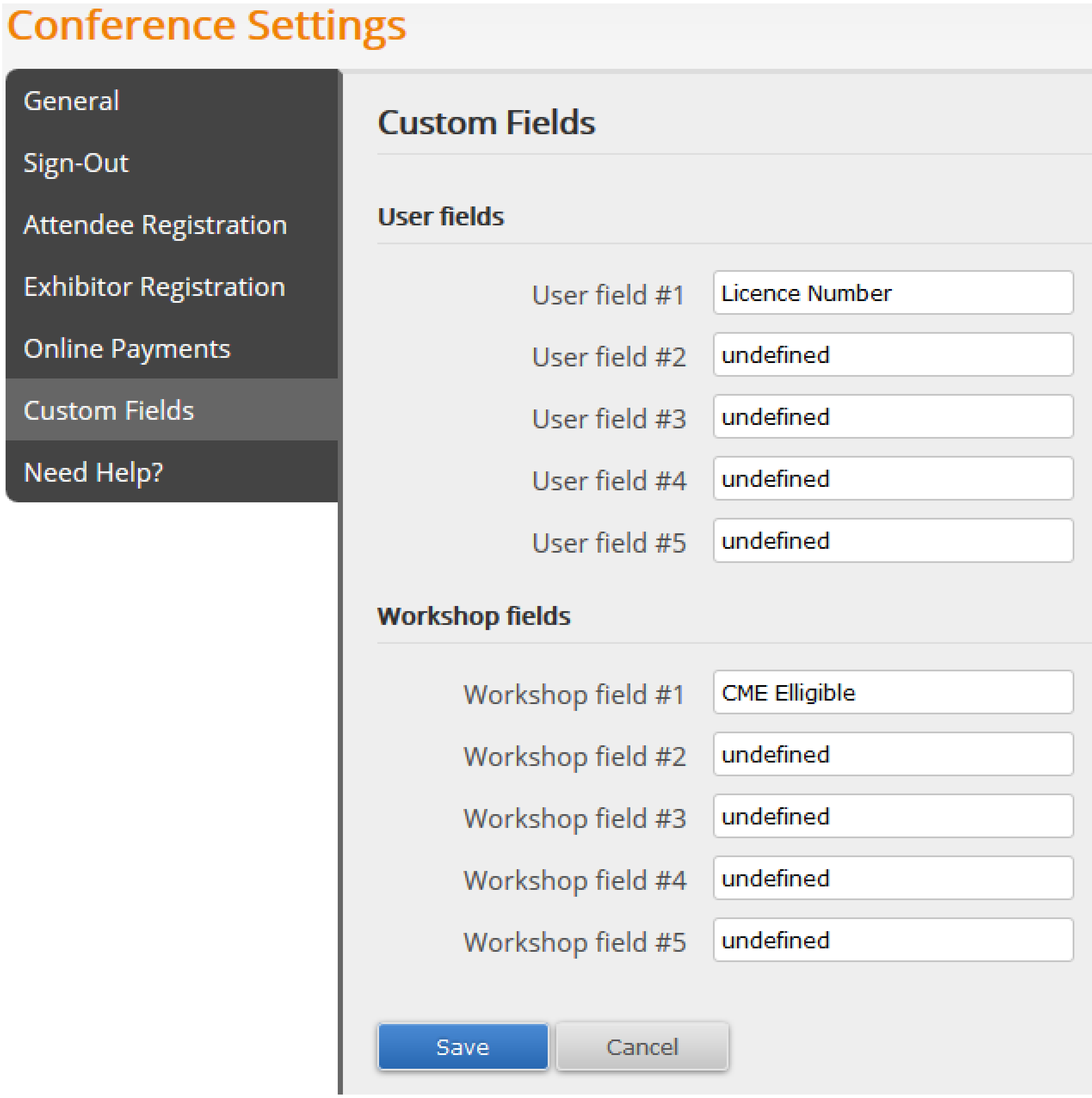
How to Access: Advanced Options > **Settings** > **Custom Fields**

This are displays 5 new custom text fields related to either an **Attendee** and/or the **Workshop/Session**. We offer quite a lot of standard information that can be stored on each **Attendee** and **Workshop** but in case you need more fields for special codes or information that is their purpose. For example, in regards to the **Workshops** these fields can be the **Workshop** “Category” that you might use to group **Workshops** in your exports or even a **Session ID** that may be required by your accreditation organization.

Additionally these **Attendee** and **Workshop** Custom fields can be imported into **Conference Tracker** or entered manually. These can be included in our New CEU Transcript which can be emailed to each

Attendee in the form of a PDF document or you can optionally print them out to send out in the traditional mail service.

Below is where you can enter the names of the **Custom Fields** you'll want to use for your **Attendees** and **Workshops**:



Once you have entered the names of your Custom Fields simply click the **Save** button at the bottom of this form.