Conference Tracker

Conference Tracking Made Easy©
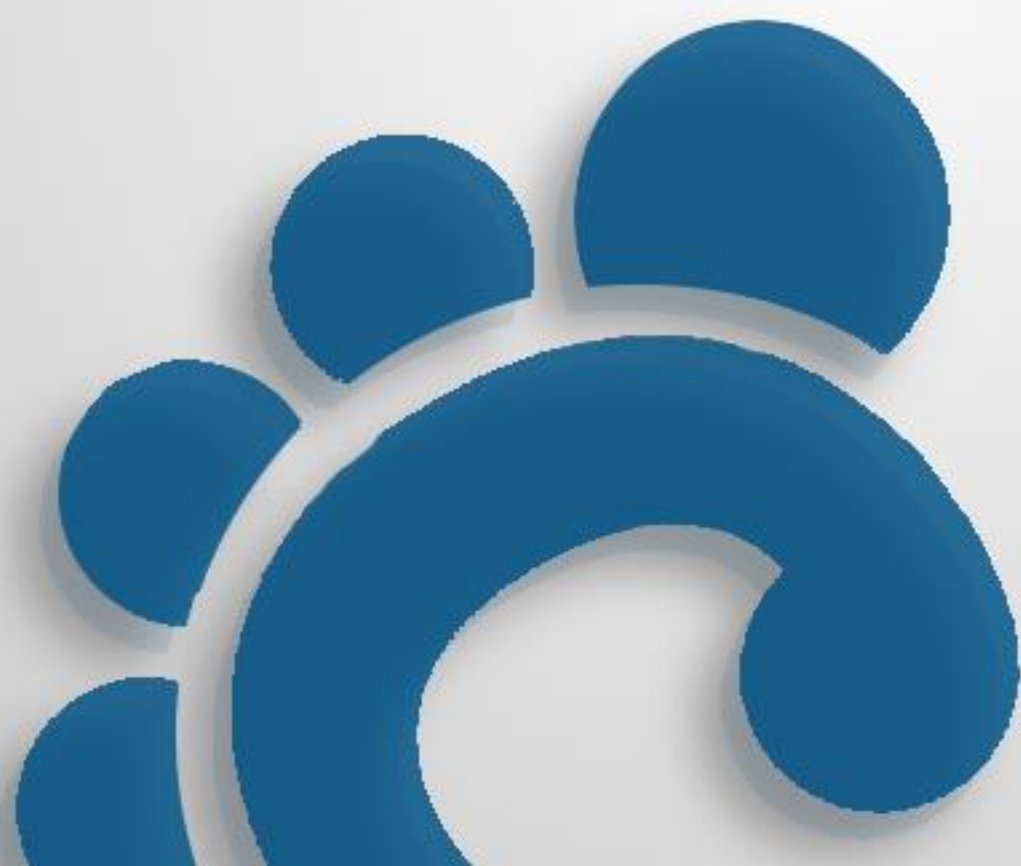
Engineerica

Quick Start Guide to Conference Tracker

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1. Setup Your Conference

To set up your conference go to **Conference** > **Basic Info** and fill with the following boxes:

- **Title**: Complete with the name of your conference.
- **Subtitle**: Complete with a reference date for the conference.
- **Schedule**: Set up the dates that the conference is going to take place.

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

2. Enter Attendees

To input your attendees' data must go to the **Attendees** section of the Conference Tracking home page.

There is two ways to setup your attendees' data:

- Using **Data Import** which you must create a **.csv** file with all the attendee data and import it. Automatically all your attendee data will be set up. Also you are able to assign the Attendee Card Number with the **.csv** file.
- Using a manual way: Go to **Attendees** > **View/Edit**. Click the **Create New** and complete the following box spaces:
    - **First Name**
    - **Last Name**
    - **Email**
    - **Password**
    - **Role**: Select the Attendee role.

Click the **Save** button to save your input data. Also you are able to assign the attendee card number. Go to **Attendee** > **View/Edit** > **Assign Cards**.

- Click in the card number field.
- Type the name of the attendee in the Assign to text box.
- Click the **Save** button to save the data.

3. Enter Conference Schedule

To entering the Conference Schedule go to **Conference** > **View/Edit Schedule**. Click the **Create Workshop** to set up sessions in the conference.

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

- Click the **Create Workshop** button.
- **Name**: Fill with the name of the session.
- **When?**: You must type the date when is going to take the session and then the duration time.
- **Where?**: Select the room (the location) where is going to take place the workshop.
- **Speakers**: The speaker in the conference workshop.
- **Credits**: The amount of credits given to each attendee for attendance at the workshop.

Click the **Save** button to save the data recently added.

NOTE: Rooms must be created before importing or adding the workshops. Rooms are simply a name for the place the workshops will be taking place and can be created under Conference > View/Edit Schedule and clicking the Edit Rooms button.

4. Design Attendee Badges and Print

Design

To design your attendance certificate go to **Badges** > **Design**. Under the **Design Your Badge** you have the tools to create your design.

- **Toolbox**: In this section helps you to add text and add image as a layer in the canvas.
- **Select Control**: This control allows you to select the part of the Canvas to edit.
- **Canvas Properties**: This tool helps you to change and edit the background of the canvas, e.g. change the color or change the background image only.

Click the **Save** button to save the changes of the Badge design.

Print

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

Steps to print individually:

- Go to **Badges** > **Print** > **Only one certificate**
- Type in the **Attendee** text box the name of the attendee or the attendee's email.
- Click the **Generate Badge**.

- When the badge/badges are ready click the **View Badges** link at the bottom of the page to download the certificate file.

Steps to print all the certificates:

- Go to **Badges** > **Print** > **Download all Certificates**
- Click the **Generate all Certificates**
- Wait till the badges are ready to download and then click the **View Badges** link at the bottom of the page to download the certificate file...

NOTE: You can also email badges if you prefer not to print them yourself. This way you only have to reprint lost or forgotten badges at the conference. It may also cut down on costs for badge card stock, holders, and lanyards.

5. Record Attendance

Use your Apple attendance tracking device to sign-in/sign-out attendees.

You must download the iConf software from the Apple App Store:

iConf at the Apple iTunes App Store

Here are some helpful guides to using the iConf software on you Apple device:

Operator Quick Start Manual

Operator Checklist

Administrator Advanced Options

6. View and Edit Attendance Data

Go to **Attendance** > **View/Edit Logs** In that page you can see your Attendance data with the follow data:

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

Also you're able to create missing logs, to do so you must fill the next text boxes after click the **Create Log** button:

- **Attendee**: The attendee whom is going to create the session log.
- **Workshop**: The session where the attendee had signed in.
- **Sign-In Date**: The date when the attendee had sign-in.
- **Time**: The time when the attendee had sign in.

Click the **Save** button to save the input data.

7. Design Attendance Certificates

To design your attendance certificate go to **Certificate** > **Design**. Under the **Design Your Certificate** you have the tools to create your design.

- **Toolbox**: In this section helps you to add text and add image as a layer in the canvas.
- **Select Control**: This control allows you to select the part of the Canvas to edit.
- **Canvas Properties**: This tool helps you to change and edit the background of the canvas, e.g. change the color or change the background image only.

Click the **Save** button to save the changes of the Certificate design.

8. Print Conference Certificates

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

Steps to print individually:

- Go to **Certificates** > **Print** > **Only one certificate**
- Type in the **Attendee** text box the name of the attendee or the attendee's email.
- Click the **Generate Certificate**.
- When the certificate is ready click the **View Certificates** link at the bottom of the page to download the certificate file.

Steps to print all the certificates:

- Go to **Certificates** > **Print** > **Download all Certificates**
- Click the **Generate all Certificates**
- Wait till the certificates are ready to download and then click the **View Certificates** link at the bottom of the page to download the certificate file.

9. Broadcast Conference Certificates

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

To Send the Certificate individually, follow these steps:

- Go to **Certificates** > **Email** > **only one certificate**.
- Enter the name (or email) of the attendee at **Attendee** text box.
- Click the Generate Certificates and wait till Review and Send page appears.
- Optionally can verify the certificate design at **Review the certificates before sending** section.
- At last click the **Email Certificates** at **Send them by email** section.

To Send the All of the Certificates follow the next steps:

- Go to **Certificate** > **Email** > **Email all certificates**.
- Click the **Generate all certificates** and wait till Review and Send page appears.
- Optionally can verify the certificate design at **Review the certificates before sending** section.
- At last click the **Email Certificates** at **Send them by email** section.

10. Export Conference Data

To export your data go to **Attendance** > **Export Data**. You can download your main data clicking over the **Download** lightened text. You are able to download your data as **.csv**, **HTML** and **Excel 2007/10** file. The data able to download is:

- **Attendees**
- **Operators**
- **Cards**
- **Workshops**
- **Raw Cards**
- **Sign-In Log**