



Conference Tracker

Conference Tracking Made Easy[®]



www.engineerica.com

©Engineerica Systems, Inc.
1994-2018 All Rights Reserved.



Engineerica

Quick Start Guide to Conference Tracker

Table of Contents

1. Setup Your Basic Conference Information and Time zone	3
2. Create Conference Sessions	3
3. Create/Import Attendees or Enable Online Registration	4
4. Design Attendee Badges and Print.....	5
Design.....	5
Print.....	5
5. Record Attendance.....	6
6. Clean up Attendance Data	6
7. Design Attendance Certificates and CEU Transcripts	7
8. Print Attendance Certificates or CEU Transcripts	7
9. Broadcast Conference Certificates and Transcripts	8
10. Export Conference Data.....	9

1. Setup Your Basic Conference Information and Time zone

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

- **Title:** Complete with the name of your conference.
- **Subtitle:** Complete with a subtitle or slogan for your conference.
- **Website:** Complete with your event website.
- **Address:** Complete with the address of your venue.
- **Conference Description:** Complete with a description for your conference.
- **Conference Dates:** Complete with the dates that the conference will occur on.

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

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

To set up your Time Zone go to **Advanced Options > Settings > General**

- Once there select the Time Zone in the drop down box.
- Be sure to click the **Save** button when finished.

2. Create Conference Sessions

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

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

- Click the **Create Session** button.
- **Name:** Fill with the name of the session.
- **When?:** Select the date of the session and enter the duration. (The available dates here are based on the dates inputted in **Basic Information**)
- **Where?:** Select the room (the location) of the session. (The available rooms are based on the rooms created in the **View/Edit Sessions** menu)
- **Presenters:** The presenter of the session. You may add multiple presenters. (Only users with the **Presenter** role will be able to be added here)
- **Credits:** The amount of credits given to each attendee for attending the session. You may use decimals here.
- **Required Presence:** The percentage at which an attendee must be in a session to receive credit for it.

Optional settings:

- **Capacity:** The limit of the session. Once registrations hit the number specified here, no more registrations will be accepted.
- **Fee:** The amount of money it costs to register for this session.
- **Require users to sign-out:** Check this box if you want your attendees to sign in and out.
- **Available for online registration:** Check this box if you want this session to be available for online registration. (To enable online session registration, please check your **Settings**)

Click the **Save** button to save.

NOTE: Rooms must be created manually adding sessions. Rooms are simply a name for the place the workshops will be taking place and can be created under **Conference > View/Edit Sessions** and clicking the **Edit Rooms** button. If you are importing your sessions, rooms will be automatically created if the **Room** column is filled out.

3. Create/Import Attendees or Enable Online Registration

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

There are three ways to setup your attendees' data:

- Using **Import Data**. You'll be able to create a .CSV file to quickly upload your entire list of attendees into the Conference Tracker system. Click [here](#) to find out more about importing your data.
- Using manual entry: Go to **Attendees > View/Edit**. Click the **Create New** button and complete the following box spaces:
 - **First Name**
 - **Last Name**
 - **Email**
 - **Role:** Make sure the **Attendee** role is selected.

Click the **Save** button to finish adding your attendee or **Save and add another** to continue adding more attendees.

- Using **Online Attendee Registration**: Attendees will be able to register themselves through an online web form. [Click here](#) to find out more about using **Online Attendee Registration**.

You can also assign card numbers to the attendees. Go to **Attendee > View/Edit > Cards / ID Numbers** to make changes to card numbers.

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

4. Design Attendee Badges and Print

Design

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

If you'd like a full description on the functions of the badge designer, please click [here](#).

Print

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

Steps to print individually:

- Go to **Badges > Print**
- Choose the badge design you want to use using the drop down menu next to **Badge Design**
- On the bottom of the page, under **Only specific badges**, enter the names of the attendees you want to print.
- Click on **Generate badges**.
- When the badge/badges are ready, click the **View Badges** link at the bottom of the page to download the PDF.

Steps to print all the certificates:

- Go to **Badges > Print**
- Choose the badge design you want to use using the drop down menu next to **Badge Design**.
- Click on **Generate All Badges**.
- Wait till the badges are ready to download and then click the **View Badges** link at the bottom of the page to download the PDF file.

For more information on printing badges, please click [here](#).

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.

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

5. Record Attendance

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

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

[Conference Tracker app on the Apple iTunes App Store](#)

[Conference Tracker app on the Google Play Store](#)

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

[Conference Tracker App Operator Manual](#)

[Conference Tracker App Operator Quick Start Guide](#)

[Conference Tracker App Administrator Advanced Options](#)

6. Clean up Attendance Data

Go to **Attendance** > **View/Edit Logs**

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

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

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

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

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

For help fixing these invalid logs, check out the [Conference Cleanup Checklist](#).

7. Design Attendance Certificates and CEU Transcripts

To design your attendance certificate, go to **Certificates > View/Edit**. To design your CEU Transcripts, go to **CEU Report > View / Edit**.

You can make multiple designs for both the attendance certificates and the CEU transcripts. They both share the same designer as the badge designer, and the only major difference between the two is that the CEU transcripts can use a Table to present the classes and credits that the attendee earned.

For more information regarding certificates, please [click here](#).

For more information regarding CEU transcripts, please [click here](#).

8. Print Attendance Certificates or CEU Transcripts

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

Steps to print individually:

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

Steps to print all the certificates:

- Go to **Certificates > Print**
- Select the certificate design you want to use using the drop down menu next to **Certificate Design**.
- Click the **Generate all Certificates** button.
- 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 PDF.

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

Steps to print individually:

- Go to **CEU Report > Print**

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

Steps to print all the transcripts:

- Go to **CEU Report > Print**
- Select the transcript design you want to use using the drop down menu next to **Transcript Design**.
- Click the **Generate all transcripts** button.
- Wait until the transcripts are ready to download and then click the **View Transcripts** link at the bottom of the page to download the transcript PDF.

9. Broadcast Conference Certificates and Transcripts

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

To Send the Certificate individually follow these steps:

- Go to **Certificates > Email**.
- Select the certificate design you want to use using the drop down menu next to **Certificate Design**.
- Scroll down to the **Specific certificates** section and enter the names of the attendees you want print the certificates for.
- Click the **Generate Certificates** button and wait until **Review and Send** page appears.
- Optionally, you can verify the certificate design using the **Review the certificates before sending** section.
- Click on **Edit Email Contents** to change the contents of the email message.
- Click **Email Certificates** to send the certificates.

To Send All of the Certificates follow these steps:

- Go to **Certificate > Email**.
- Select the certificate design you want to use using the drop down menu next to **Certificate Design**.
- Click the **Generate all Certificates** button.
- Optionally, you can verify the certificate design using the **Review the certificates before sending** section.
- Click on **Edit Email Contents** to change the contents of the email message.
- Click **Email Certificates** to send the certificates.

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

To Send the transcripts individually follow these steps:

- Go to **CEU Report > Email**.
- Select the transcript design you want to use using the drop down menu next to **Transcript Design**.
- Scroll down to the **Specific transcripts** section and enter the names of the attendees you want print the transcripts for.
- Click the Generate Transcripts button and wait until Review and Send page appears.
- Optionally, you can verify the transcript design using the **Review the transcripts before sending** section.
- Click on **Edit Email Contents** to change the contents of the email message.
- Click **Email Transcripts** to send the transcripts.

To Send All of the Transcripts follow these steps:

- Go to **CEU Report > Email**.
- Select the transcript design you want to use using the drop down menu next to **Transcript Design**.
- Click the **Generate all Transcripts** button.
- Optionally, you can verify the transcript design using the **Review the transcripts before sending** section.
- Click on **Edit Email Contents** to change the contents of the email message.
- Click **Email Transcripts** to send the transcripts.

10. Export Conference Data

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

- **Attendees**
- **Attendees incl. Reg Info**
- **Operators**
- **Presenters**
- **Exhibitor Representatives**
- **Exhibitor Administrators**
- **Cards / ID Numbers**
- **Sessions**
- **Leads**
- **Raw Swipes**
- **Attendance Logs**
- **Attendance Logs (with details)**

- **Check-Ins**
- **Check-Ins (with delivered handouts)**
- **Conference Registrations**
- **Sessions Registrations**
- **# of Sign-Ins per Session**
- **# of Attendees per Session**
- **Leads App Users**