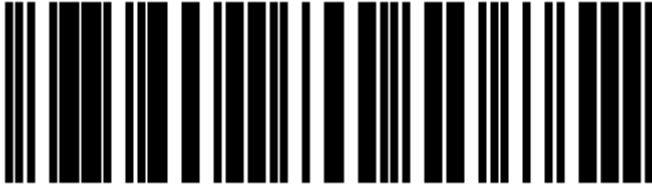


Instructions on setting up and managing data scanning Edinburgh higher education exhibition only

To ensure you get the most from UCAS' data scanning service, there are four key stages in setting up and managing the process.

1. Defining and personalising your scanning data.
2. Downloading and setting up the app (if you are using it).
3. Managing data scanning at each event.
4. Accessing and downloading data.

Below is a quick checklist of key actions for you, to activate and manage your data scanning.

| | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| Prior to the event | |
| In your ENet account, update any additional opt ins you wish to include (see 'Personalising your scanning data'). | |
| Download the SmartLead UCAS app (see 'Downloading and setting up the app'). The PIN for hire devices is 8400. | |
| At the event | |
| Enter your unique licence code (see 'Managing data scanning at each event'). | |
| Scan the event specific barcode (see 'Downloading and setting up the app').  | |
| Check the homepage of the app, to ensure the event name and date(s) are correct (see 'Downloading and setting up the app'). | |

Technical support

Frequently asked questions are at the end of this document, but if they don't answer your query, contact the Events Technical Team on 01242 544 808, or at events@ucas.ac.uk.

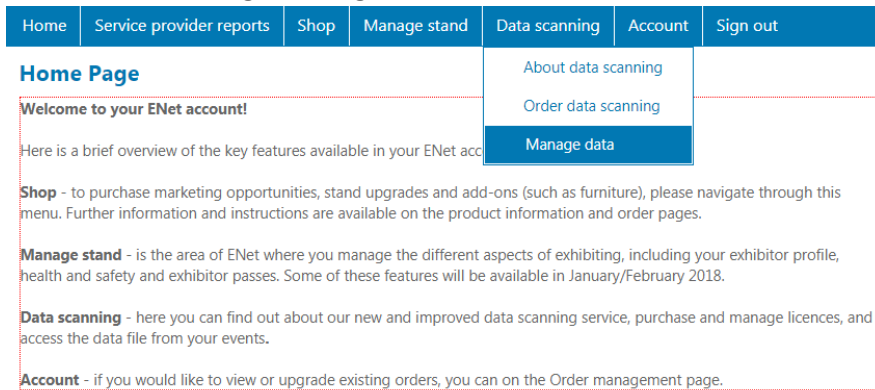
Updates to the app

- **iPad version now available** – the app now supports iPads, and the user interface has been redesigned for larger screens.
- **Improved contact tags** – You can now select yes, no, or unanswered for each tag. Previously you had only two options - Y or N, with unanswered questions defaulting to N. When you download your data file, tags will now display as Y, N, or blank (unanswered).
- **Bug fixes** – we've optimised multiple areas for better performance, including the scan engine and logging.

1. Defining and personalising your scanning data

In addition to those already predefined by UCAS' event registration process, you can set up your own additional tags in your ENet account. These will determine your own, ongoing communication with those you scan.

1. Select **Data scanning > Manage data**.



Home Service provider reports Shop Manage stand Data scanning Account Sign out

Home Page

Welcome to your ENet account!

Here is a brief overview of the key features available in your ENet account.

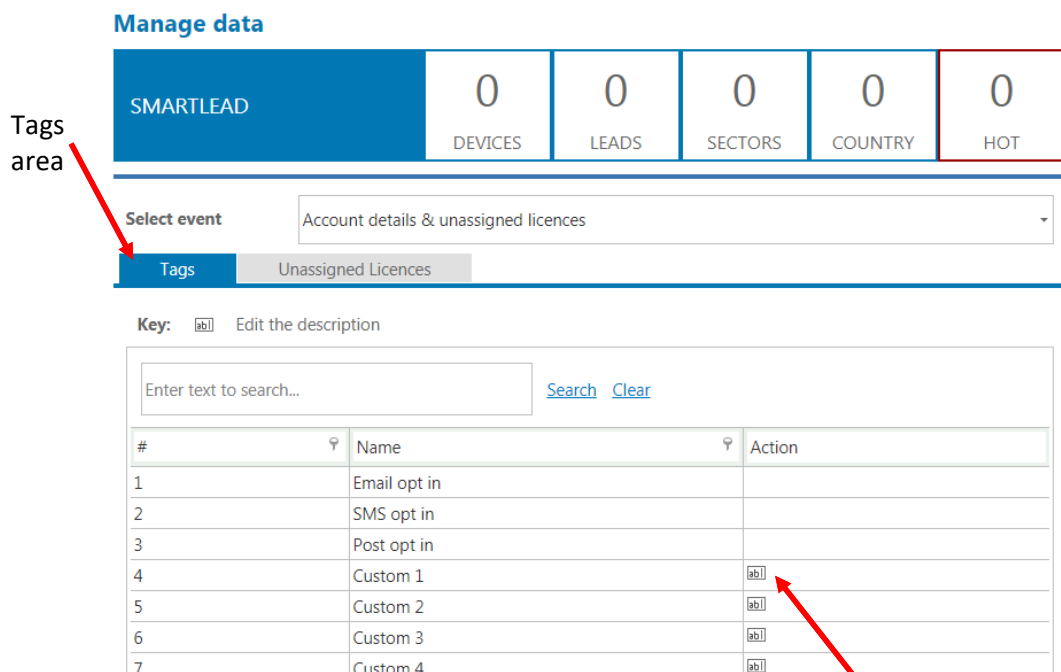
Shop - to purchase marketing opportunities, stand upgrades and add-ons (such as furniture), please navigate through this menu. Further information and instructions are available on the product information and order pages.

Manage stand - is the area of ENet where you manage the different aspects of exhibiting, including your exhibitor profile, health and safety and exhibitor passes. Some of these features will be available in January/February 2018.

Data scanning - here you can find out about our new and improved data scanning service, purchase and manage licences, and access the data file from your events.

Account - if you would like to view or upgrade existing orders, you can on the Order management page.

2. You'll automatically be directed to the **Tags** area, where you'll see that opt in tags have already been set up for you (these cannot be changed). Using these tags, you can ask those you scan what their communication preference is, and easily record their answer. There are an additional seven tags for your own use, which can be used to ask specific preferences related to your organisation. e.g. whether they'd like to receive a prospectus.




Manage data

SMARTLEAD





0 DEVICES 0 LEADS 0 SECTORS 0 COUNTRY 0 HOT

Select event Account details & unassigned licences

Tags Unassigned Licences

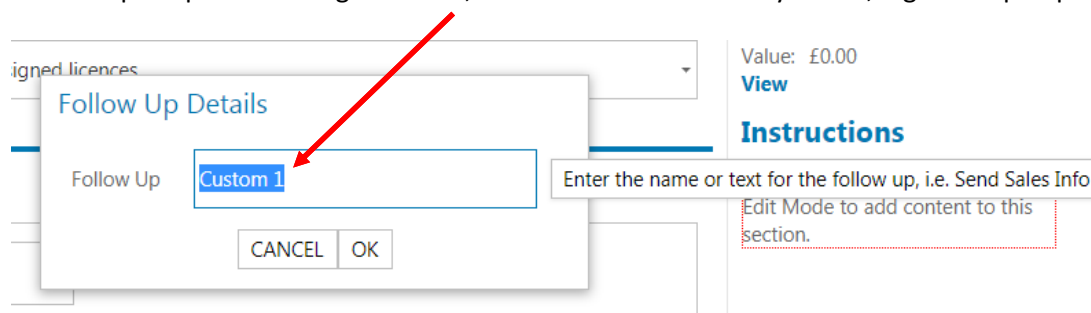
Key:  Edit the description

Enter text to search... [Search](#) [Clear](#)

| # | Name | Action |
|---|--------------|-------------------------------------------------------------------------------------|
| 1 | Email opt in | |
| 2 | SMS opt in | |
| 3 | Post opt in | |
| 4 | Custom 1 |  |
| 5 | Custom 2 |  |
| 6 | Custom 3 |  |
| 7 | Custom 4 |  |

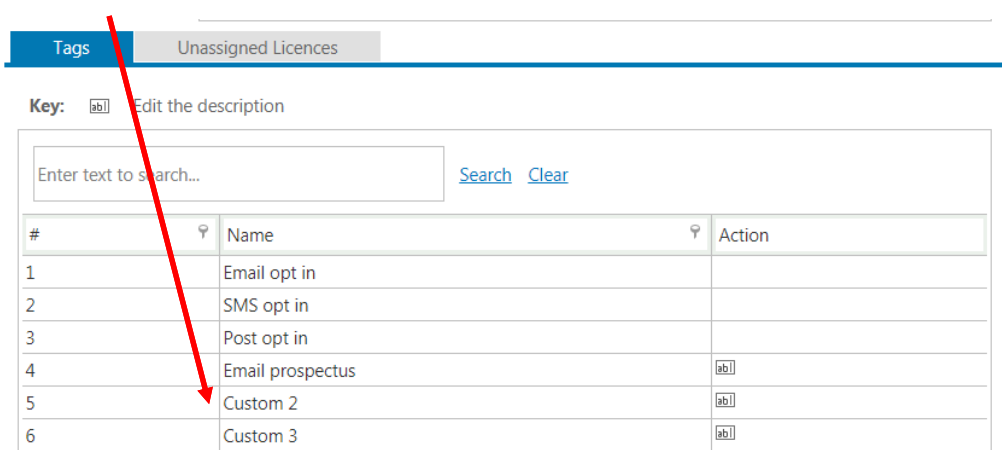
Click this **ab** icon to change the tag titles.

You'll be prompted to change the title, and name this whatever you like, e.g. email prospectus.



Click **OK**.

This will then update your list and your app (when you connect the app to the internet).



You're ready to use tags once you get to this point. Or you can continue to add additional custom tags (up to seven).

Note: UCAS ask for email, SMS and post preference information at event registration. The responses determine how UCAS can use the data. We transfer this information to exhibitors as part of the reporting because you can then use these preferences as a guide for your first post event communication (if the communications column "DP Learner Communications Type" is empty, the default is email). Your own tags, and the data collected against them, should define how you communicate with contacts going forward.

New: From August 2018 the tags will offer a Yes (green), No (red) or unselected grey option. Your ENet report will show Y, N or blank.

For your information, the text on the tickets sent to visitors is as follows:

When you arrive at the event, UCAS will scan your barcode ticket so that we know you've arrived.

Keep your ticket handy – if you would like to receive further information from particular exhibitors, you can scan your barcode at their stand.

If you do this, we will give them your contact details so that they can send you information such as course details or invites to open days.

If you do not want an exhibitor to have your contact details, then simply do not scan your barcode.

Visit ucas.com/exhibitions for:

- preparation tips

- exhibitor information
- venue details
- health and safety information”

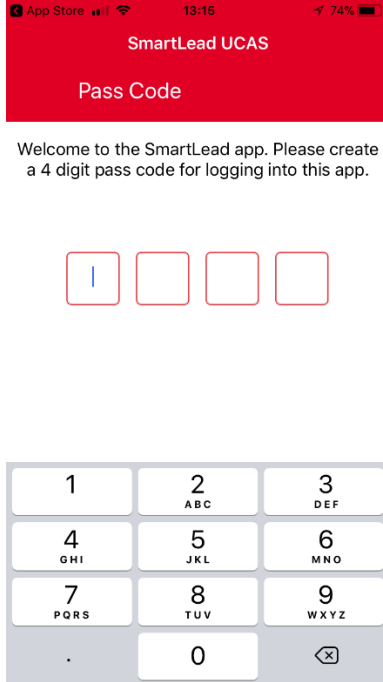
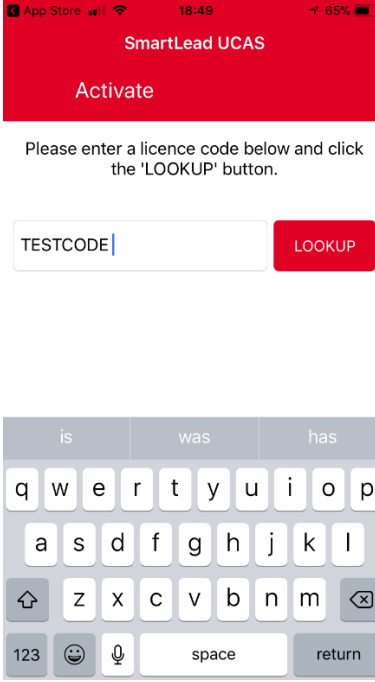
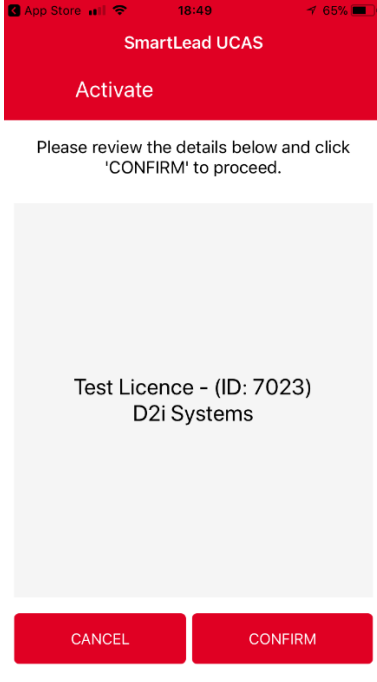
2. Downloading and setting up the app

SmartLead UCAS is the app used for data scanning at UCAS higher education exhibitions. You can download it from the Google Play Store or Apple App Store.

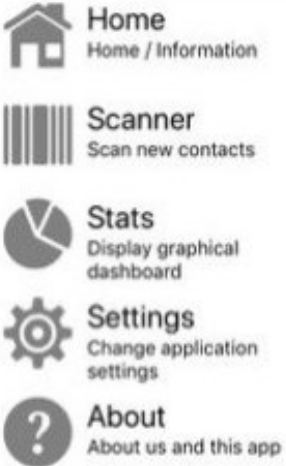
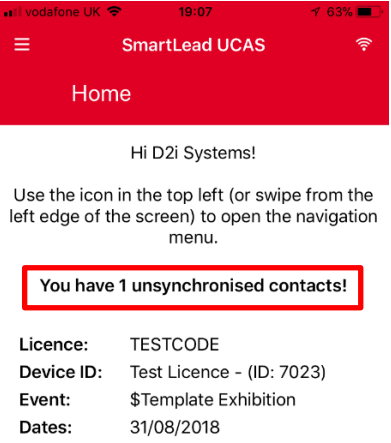
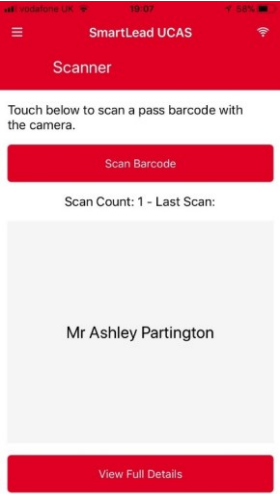
New: iPad and iPhone versions of the app are now available.

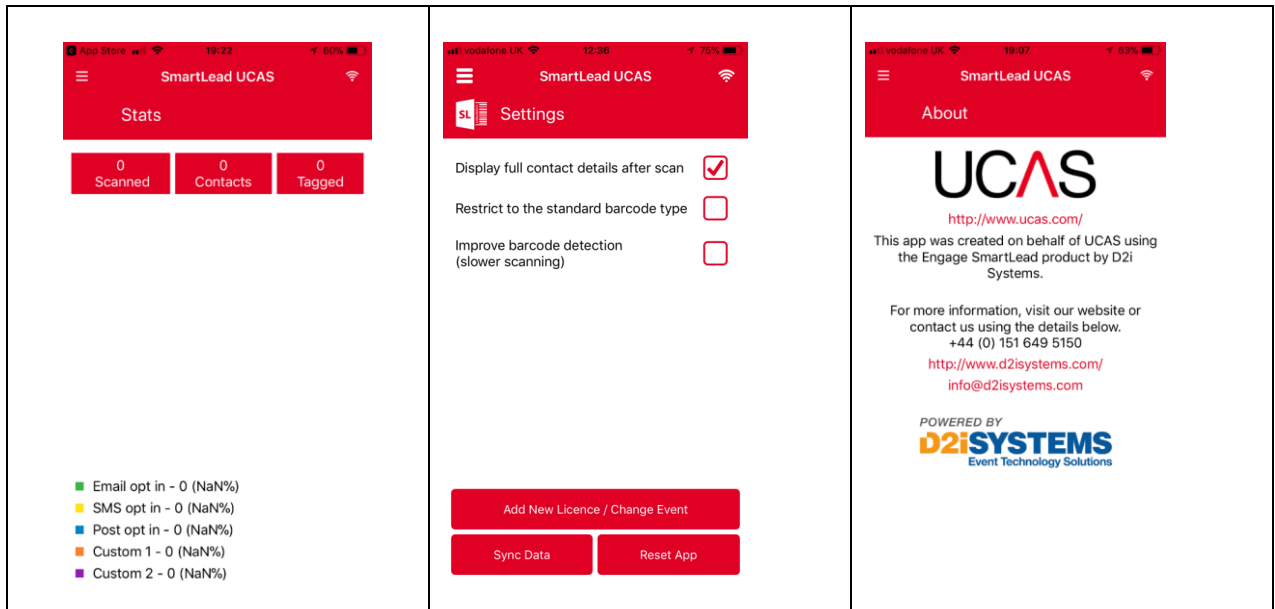
Note: As a minimum requirement, your device needs to use operating system Android 8 or iOS 7, and should have at least a five mega pixel camera (the better the camera, the more reliable the scan).

To set up the app

| 1. Create a password | 2. Enter the licence key | 3. Confirm |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>You'll be prompted to choose a four-digit passcode (and confirm it), which can be used to sign in to the app on your chosen device.</p> | <p>Enter your unique licence code, which can be found in the 'Manage data' section of your ENet account.</p> | <p>Confirm your licence by clicking the 'confirm' button. Your app is now ready to use.</p> |
|  <p>The screenshot shows the 'SmartLead UCAS' app interface with a red header and the text 'Pass Code'. Below the header, it says 'Welcome to the SmartLead app. Please create a 4 digit pass code for logging into this app.' There are four empty red boxes for the passcode. At the bottom, a standard iOS numeric keypad is visible.</p> |  <p>The screenshot shows the 'SmartLead UCAS' app interface with a red header and the text 'Activate'. It prompts the user to 'Please enter a licence code below and click the 'LOOKUP' button.' There is a text input field containing 'TESTCODE' and a red 'LOOKUP' button. A keyboard is visible at the bottom.</p> |  <p>The screenshot shows the 'SmartLead UCAS' app interface with a red header and the text 'Activate'. It prompts the user to 'Please review the details below and click 'CONFIRM' to proceed.' The details shown are 'Test Licence - (ID: 7023) D2i Systems'. At the bottom, there are two red buttons: 'CANCEL' and 'CONFIRM'.</p> |

To navigate the app

| Menu | Home | Scanner page |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Access the menu in the top left-hand corner of the screen.</p> <p>To exit, you need to use your device controls, as there's no exit button in the app.</p> | <p>This page shows you:</p> <ul style="list-style-type: none"> • the licence you're using • your device ID • the event you're attending • the dates of the event • how many unsynchronised contacts you have | <p>The details page provides all the key information about the last visitor to be scanned (this will not include any personal details when you first use the app).</p> |
|  |  |  |
| Stats | Settings | About |
| <p>Track your scanning stats here.</p> | <p>Use this section to:</p> <ul style="list-style-type: none"> • synchronise your data – when you click the 'Sync data' button, you'll see a scan log detailing all of your barcodes • change event • reset your app (not recommended) • restrict the standard barcode type • improve barcode detection (slower scanning) | <p>Information about the app provider and UCAS.</p> |



3. Managing data scanning at the event

Two things need to be in place to ensure you accurately scan data.

1. All exhibitors should be using their own licence code to set up their scanners. The licence code can be found in the Manage data section of your ENet account, and a different one is needed for each event. It will only be activated when used to scan the specific event barcode in the scanning app.

To find your allocated licence codes, select **Unassigned Licences**. Ensure the **Select event** drop-down says **Account details & unassigned licences**. This is the selection you will always need to manage your licences.

Select event: Account details & unassigned licences

Tags: Unassigned Licences

Key: Set the friendly name for the device

Enter text to search... [Search](#) [Clear](#)

| Device ID | Licence Code | Friendly Name | Type | PIN | Leads Captured | Action |
|-----------|--------------|------------------|------------|------|----------------|--------|
| 4 | 5MHPEE48 | 04 | Mobile APP | 1234 | 0 | |
| 10 | RJ4H2XZD | 10 | Mobile APP | 1111 | 0 | |
| 15 | 92HZPXDA | 15 | Mobile APP | | 0 | |
| 16 | 1AB8GWU5 | 16 | Mobile APP | | 0 | |
| 17 | 4FRFGQZM | 17 | Mobile APP | | 0 | |
| 18 | 9STB9YG7 | 18 | Mobile APP | | 0 | |
| 6615 | IKCFJBK5 | Smartlead Device | Mobile APP | | 0 | |
| 6616 | UQU2Q1L6 | Smartlead Device | Mobile APP | | 0 | |
| 6617 | VY06K7NC | Smartlead Device | Mobile APP | | 0 | |
| 6618 | 65SXF6XA | Smartlead Device | Mobile APP | | 0 | |

Page 1 of 3 (23 items) 1 2 3

A **licence code** is needed for each scanner device, and is only used for one event (however many days it lasts). You can activate one by adding it to the SmartLead UCAS app when prompted, and then scanning the event barcode we give you. The licence will link the data to the individual event report.

The PIN number is created on your scanner device when you add the licence. It's recorded in your ENet account, so you can look it up if you forget it.

Click this **ab** icon to change the **Friendly Name** (which will have a default name of Smartlead device) of the licence, so you can easily identify how each item is used. You can match the licence name to the event and user, e.g. David Smith Bristol.

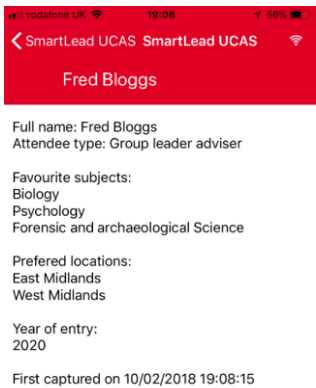
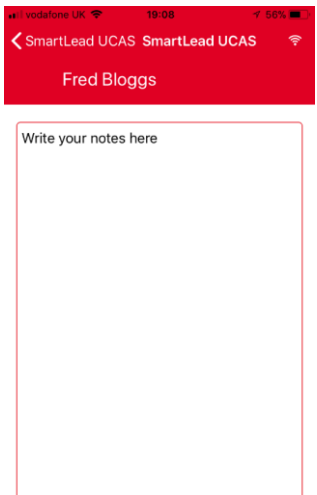
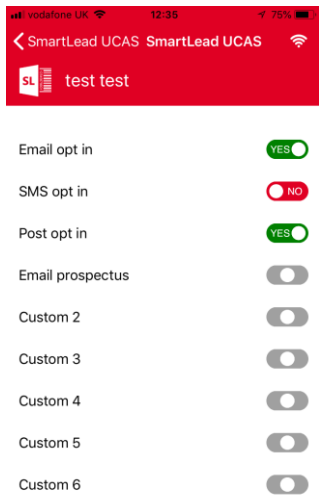
2. A sample delegate barcode is provided for each event, which should be the first one you scan after entering your licence code. This barcode is event specific. Once scanned, this will ensure all your data goes into your account, rather than the test account.

As a reminder, the barcode for the Edinburgh higher education exhibition is below.



Scanning delegates

- Select the **scanner** option on the menu.
- This page will provide a view of the last person scanned.
- You can **view full details** of the last person scanned.
- **Scan a barcode** to scan your next barcode.
- Once you scan the barcode, you'll see a page containing the visitor details, as shown in the image.
- Image 2 and 3 show how to add additional information for the scanned visitor.
- If you'd like to scan another barcode, click the back arrow in the top left-hand corner, and click **Scan barcode**.

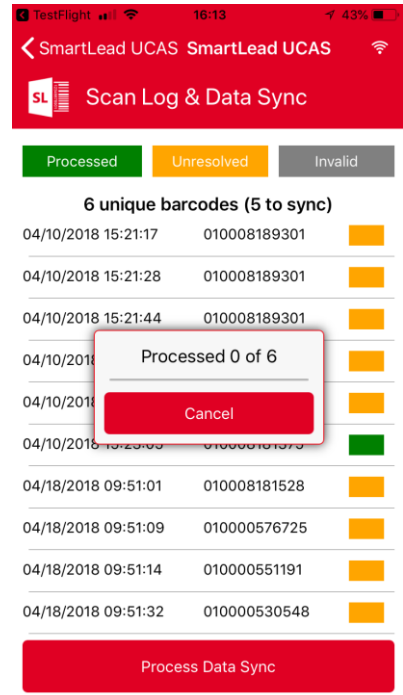
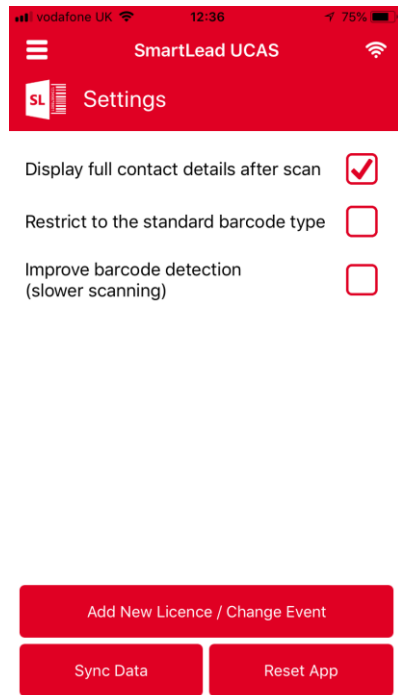
| 1. Details | 2. Notes | 3. Tags |
|--------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>The details page loads with all the key information about the last visitor scanned.</p> | <p>The notes page allows you to write notes about the visitor, for your reference.</p> | <p>Three default tags have been set up for you to manage your visitors' preferences. Seven tags remain blank for you to programme. See 'personalising your scanning data' for more information. The tags now have a Yes (green), No (red) or unselected (grey) option.</p> |
|  |  |  |

Synchronising data

Data will not synchronise unless you have an internet connection. To push your device to synchronise the data when you have an internet connection:

- go to the menu
- click **Settings**
- click **Sync Data** – you will be taken to the Scan Log
- click process data sync

To comply with General Data Protection Regulation (GDPR) regulations, the owner of the ENet account for your provider is considered the data controller.



1. Accessing and downloading data

1. In your ENet account, select **Data scanning > Manage data**, and then the event or exhibition you wish to view the data for.

Manage data

The screenshot shows the 'Manage data' interface with a summary bar for 'SMARTLEAD' showing 0 DEVICES, 0 LEADS, 0 SECTORS, 0 COUNTRY, and 0 HOT. Below this is a 'Select event' dropdown menu with a search box containing 'Account details & unassigned licences'. A red arrow points from the dropdown menu to the 'HOT' category in the summary bar.

2. A summary of the data collected will appear as below.

Manage data

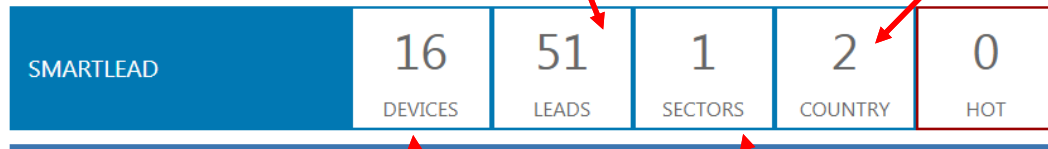
The screenshot shows the 'Manage data' interface with a summary bar for 'SMARTLEAD' showing 16 DEVICES, 51 LEADS, 1 SECTORS, 2 COUNTRY, and 0 HOT. Below this is a 'Select event' dropdown menu with a search box containing '\$Template Exhibition'. The 'Contacts' tab is selected, and a table of data is displayed. The table has columns for Date, Device, First Name, Last Name, Organisation, and Country. The data is sorted by date, showing 16 items. A red arrow points from the 'EXPORT TO EXCEL' button to the text below.

| Date | Device | First Name | Last Name | Organisation | Country |
|----------------------|--------|------------|------------|------------------------------|----------------|
| 1/19/2018 2:40:47 AM | 01 | Ashley | Partington | Winchester College | United Kingdom |
| 1/19/2018 2:40:55 AM | 01 | Fred | Bloggs | Alsop High School, Liverpool | United Kingdom |
| 1/19/2018 2:41:01 AM | 01 | Paul | Thomson | | United Kingdom |
| 1/19/2018 2:41:06 AM | 01 | Scott | Warburton | D2i Support | United Kingdom |
| 1/19/2018 2:41:19 AM | 01 | Jess | Francis | Aberdeen Grammar School | United Kingdom |
| 1/19/2018 2:43:06 AM | 03 | Ashley | Partington | Winchester College | United Kingdom |
| 1/19/2018 2:43:14 AM | 03 | Paul | Thomson | | United Kingdom |
| 1/19/2018 2:43:30 AM | 03 | Fred | Bloggs | Alsop High School, Liverpool | United Kingdom |
| 1/19/2018 2:43:34 AM | 03 | Scott | Warburton | D2i Support | United Kingdom |
| 1/19/2018 2:43:39 AM | 03 | Jess | Francis | Aberdeen Grammar School | United Kingdom |

Select **EXPORT TO EXCEL** to export the event data to an Excel spreadsheet.

3. Key to Smartlead bar.

Manage data



Number of contacts collected.

How many countries your contacts are from.

Number of devices already used and linked to your account.

This will always be one, as we have only one sector.

4. Your data report will include the following fields.

| Notes | Field name |
|------------------------------------------------|---------------------------------|
| | Date/Time |
| Device used for scan | Device |
| | Title |
| | First Name |
| | Last Name |
| | Address #1 |
| | Address #2 |
| | Address #3 |
| | Town/City |
| | County/State |
| | Postcode/Zip |
| | Country |
| | Cell/Mobile # |
| | Email Address |
| Visitor type | Badge Type |
| | Date of Birth |
| Study year | Current School Year |
| | School Name |
| | Study Regions |
| | Gender |
| Subjects in priority order | Subject Interested 1 |
| | Subject Interested 2 |
| | Subject Interested 3 |
| Interest in gap year | CONSIDERING GAP YEAR |
| Interest in studying overseas | CONSIDERING STUDYING OUTSIDE UK |
| Interest in apprenticeships | CONSIDERING STRAIGHT EMPLOYMENT |
| Subjects currently studying | Subject Studying 1 |
| | Subject Studying 2 |
| | Subject Studying 3 |
| Year that student would like to start studying | Start University Year LEARNER |

| | |
|----------------------------------------------------------------------------------------------------------|--------------------------------|
| Opt ins collected by UCAS. You can use these to decide how to contact those you have scanned. | DP Learner Communications Type |
| Tags within the SmartLead UCAS app. You can use these to collect your visitors' preferences. | Email opt in |
| | SMS opt in |
| | Post opt in |
| | Custom 1 |
| | Custom 2 |
| | Custom 3 |
| | Custom 4 |
| | Custom 5 |
| From August 2018, file displays answers 'Y', 'N' or blank to match new SmartLead UCAS app functionality. | Custom 6 |
| | Custom 7 |
| | Notes |

You can download the sample report (which includes all fields) from

www.ucasmedia.com/content/exhibitions-2018

Please note that the data file is subject to change.

Note: Data will be available for the duration of the season. On-site registration data (from those who have completed paper forms at the exhibition) will be available two working days after the event.

Frequently asked questions

1. Data error

This is due to a lack of data on the device. The user can either turn off all internet connections and synchronise at the end of the event, or top up their data.

2. Test code licence used by mistake

Synchronise device and change licence code to purchased licence code, found in your ENet account. Advise UCAS of this issue, so data can be moved to the correct event in your ENet account.

3. Test barcode scanned and licence not linked to the exhibition.

Synchronise device and change licence code to alternative purchased licence code, found in your ENet account. Scan exhibition licence code, and check home screen displays correct event. Advise UCAS of this issue, so data can be moved to the correct event in your ENet account.

4. Unresolved barcode

- The barcode may be damaged – try rescanning.
- The camera specification may not be sufficient (minimum of 5 megapixels needed). You could use a hire device, if available.
- This could be related to a test barcode being scanned at the beginning of the event, so the wrong event is assigned to the licence – refer to number 3.
- This could be because the barcode is for a different event. This problem cannot be resolved, other barcodes should scan without issue.

5. Scanned not matching contacts

Scans are the number of barcodes scanned. Contacts are the number of individual contacts who should pull through to your ENet account.

6. Internet connectivity

Changes have been made to how the app manages internet connectivity, to minimise scanning delays. We previously advised you to take the app offline where internet connectivity was a problem. You should use the app online wherever possible. There has been an improvement to the way data synchronises, should you scan offline and synchronise post-event.

7. App updates

If you're prompted to update the app when you open it, please do so. Updating the app this way will ensure all data is synchronized, and not lost. You can update the app from within the app store, but please ensure all contacts are synchronised in the app before doing so.

8. Scan log – a message will display showing the unique number of barcodes scanned. Unresolved yellow barcodes (which may be offline scans) will turn green when synchronised, unless they are unrecognised (e.g. onsite registrations). You will now also see a progress bar when synchronising.

9. Your app will sync your device data with our supplier's database (providing it is online), so we can track your scans. This will enable us to resolve any issues quickly.

10. Restricted barcode scanning – you now have the option to restrict the types of barcodes you scan to the current event ticket barcodes. This will make the scanning process quicker, but it will

only scan valid ticket barcodes. If a barcode is not valid (for example, if it's for another event), it will not scan. To turn this setting on, go to the 'Settings' tab, and turn on 'Restrict to standard barcode type'.

11. Improved barcode detection – this setting can be used if lighting is poor, or you're trying to scan a barcode with poor print quality. Using this setting will increase the time it takes to scan a barcode, but is more likely to process a valid barcode. We don't advise using this setting unless conditions are poor.