

Manual for setting up and managing data scanning

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.
5. Frequently asked questions

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 ‘Event instructions’).	
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. If they don’t answer your query, contact the Events Technical Team on 01242 544 808, or at events@ucas.ac.uk.

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

Tags area

SMARTLEAD 38 DEVICES 0 LEADS 0 SECTORS 0 COUNTRY 0 HOT

Select event Account details & unassigned licences

Tags 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	Not Specified	
5	Not Specified	
6	Not Specified	
7	Not Specified	

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.

The screenshot shows a 'Follow Up Details' dialog box. At the top, there is a dropdown menu labeled 'Select event' with the text 'Account details & unassigned licences'. Below this, there are two tabs: 'Tags' (active) and 'Licences'. The 'Follow Up' section contains an input field with a red arrow pointing to it from the dropdown menu above. Below the input field are 'CANCEL' and 'OK' buttons. To the right of the input field, there is a label 'Enter the name c'.

Click **OK**.

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

The screenshot shows the 'Tags' tab in the application. At the top, there are two tabs: 'Tags' (active) and 'Licences'. Below the tabs, there is a search bar with the text 'Enter text to search...' and 'Search' and 'Clear' buttons. Below the search bar is a table with the following data:

#	Name	Action
1	Email opt in	
2	SMS opt in	
3	Post opt in	
4	Email prospectus	

A red arrow points from the 'Email prospectus' tag in the table to the 'Follow Up' input field in the previous screenshot.

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

You have to reset the app on your phone before applying the new tags. Therefore, please add/change any tags before adding the licence code.

Note: When attendees pre-register, we ask how they'd prefer to be contacted by the exhibitors who scan their ticket – by email, post, or SMS. We then include this data as part of your report, which is available through your ENet account.

You'll find this under the column 'DP Scanner Preferences'. You can use these preferences to tailor your first post-event communications. Your ENet report also provides a date and timestamp of when each attendee's ticket was scanned, so you have evidence of when they gave their permission to be contacted.

The tags offer a Yes (green), No (red) or unselected grey option. Your ENet report will show Y, N or blank (unanswered).

The text on the tickets sent to visitors is:

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.

2. Downloading and setting up the app

SmartLead UCAS is the app used for data scanning at our higher education exhibitions. You can download it from the Google Play Store or Apple App Store. Android, iPad, and iPhone versions of the app are available.

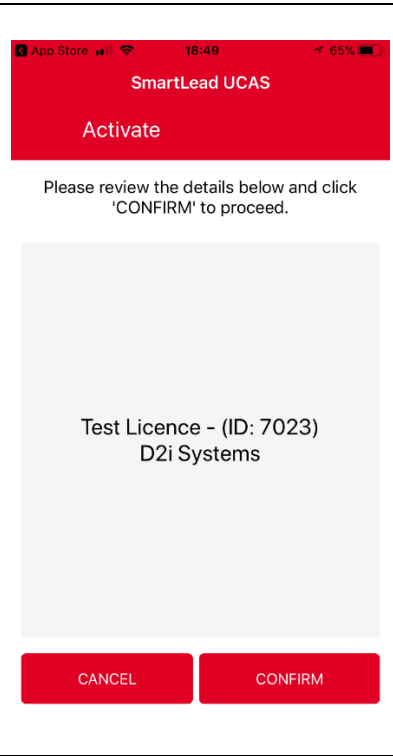
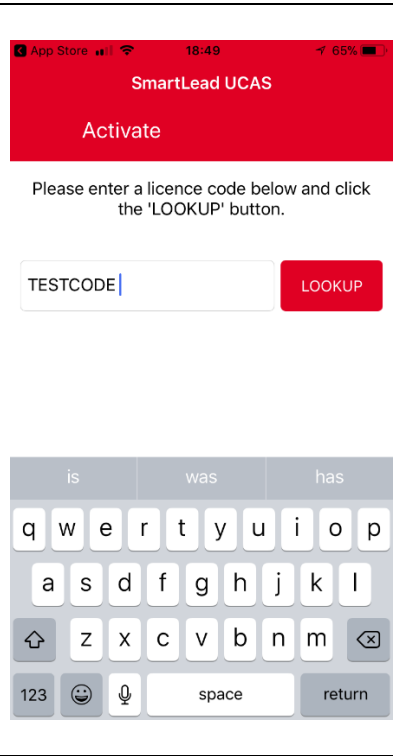
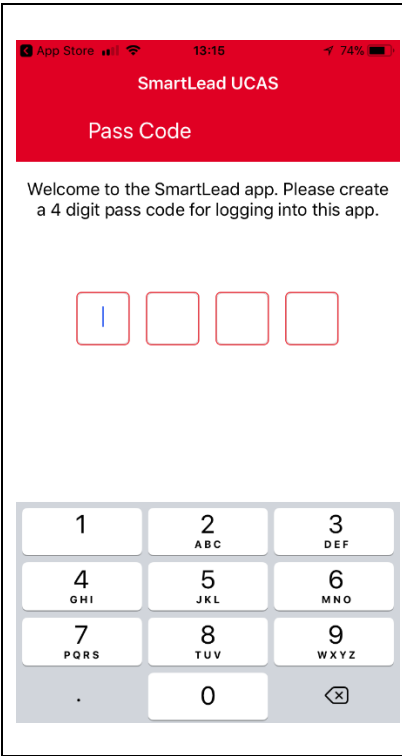
Minimum device requirements:

- Minimum operating system Android 8 or iOS 7.
- Minimum five megapixel camera – the better the camera, the more reliable the scan).
- Camera autofocus.
- At least 32.4mb of data storage available to download app.
- We recommend using phones rather than tablets for the best user experience.. The app is also available for iPads.
- The app cannot be used on Windows phones, Amazon devices, or older devices where the camera does not auto focus. We're aware of particular issues with Android tablets, in particular, Galaxy tabs.

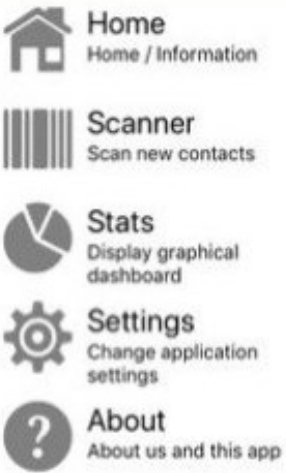
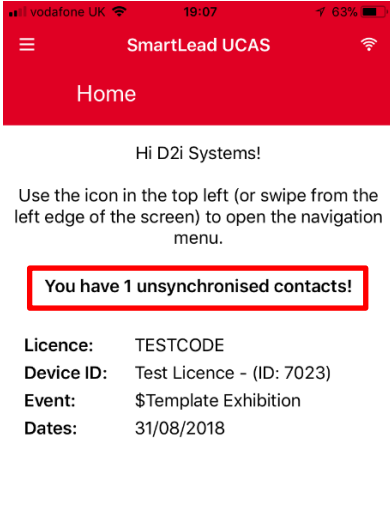
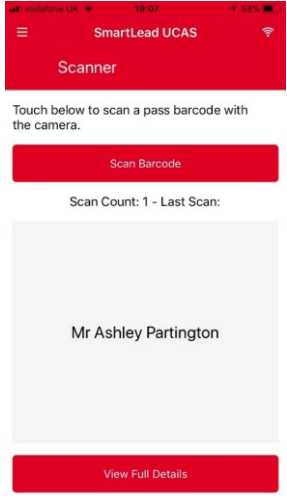
Please make sure you have the latest version of the app before arriving on-site.

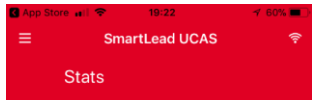
To set up the app

1. Create a password	2. Enter the licence key	3. Confirm
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.	Enter your unique licence code, which can be found in the 'Manage data' section of your ENet account.	Confirm your licence by clicking the 'confirm' button. Your app is now ready to use. Note: You will need to scan the event specific barcode (provided) before starting scanning.



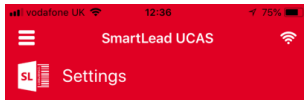
To navigate the app

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 is not an 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>



0 Scanned 0 Contacts 0 Tagged

- Email opt in - 0 (NaN%)
- SMS opt in - 0 (NaN%)
- Post opt in - 0 (NaN%)
- Custom 1 - 0 (NaN%)
- Custom 2 - 0 (NaN%)

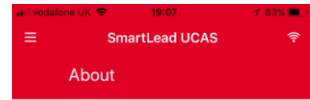


- Display full contact details after scan
- Restrict to the standard barcode type
- Improve barcode detection (slower scanning)

Add New Licence / Change Event

Sync Data

Reset App



UCAS

<http://www.ucas.com/>

This app was created on behalf of UCAS using the Engage SmartLead product by D2i Systems.

For more information, visit our website or contact us using the details below.
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Event Technology Solutions

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

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	

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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.


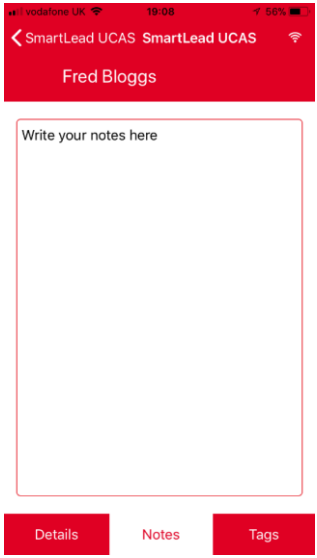
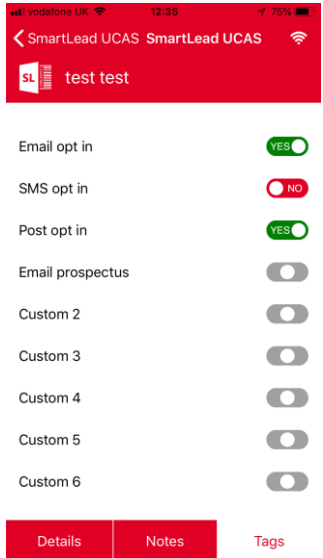
The PIN number is created on your scanner device when you add the licence. It's recorded in your ENet account, so you can look it up if you forget it.

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 (in the scanning instructions at ucasmedia.com/content/exhibitions-2019), 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.

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.
- Images 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**.

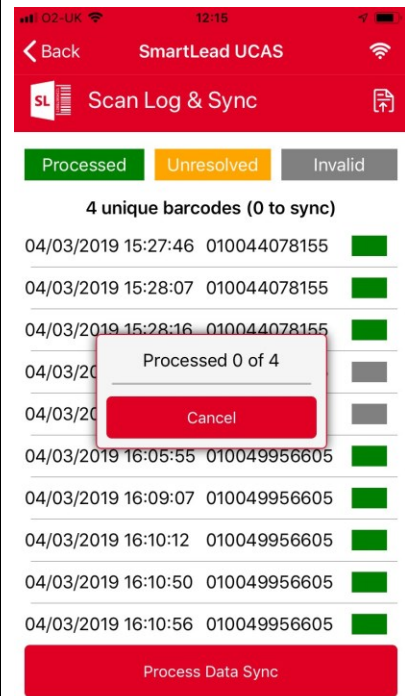
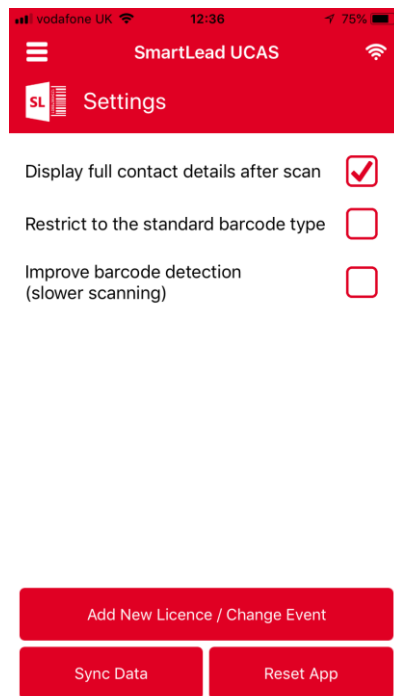
1. Details	2. Notes	3. Tags
<p>The details page loads with all the key information about the last visitor scanned.</p>	<p>The notes page allows you to write notes about the visitor, for your reference.</p>	<p>Three default tags have been set up for you to manage your visitors' preferences. Seven tags remain blank for you to programme. See 'personalising your scanning data' for more information. The tags 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
- hold the **sync** button for longer to force another sync

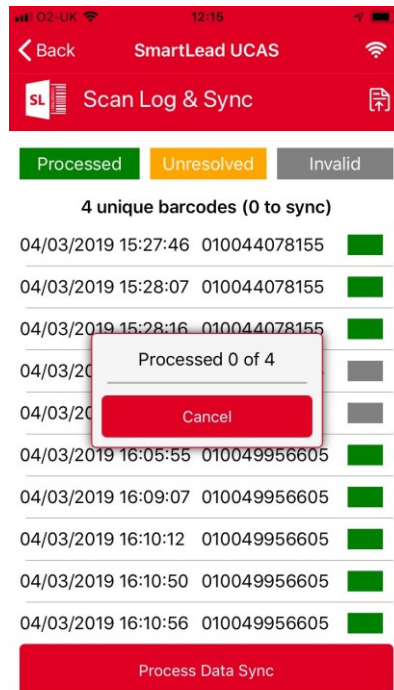
To comply with General Data Protection Regulation (GDPR) regulations, the owner of the ENet account for your provider is considered the data controller.



Error log

If you experience issues, submit an error report by clicking the icon in the top right.

This will submit a report to the app supplier to diagnose an issue.



Error log

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. You can also select the 'All Events' option to download data for all of your events.

Manage data

The screenshot shows the 'Manage data' interface. At the top, there is a summary bar with the following data:

SMARTLEAD	0	0	0	0	0
	DEVICES	LEADS	SECTORS	COUNTRY	HOT

Below this is a 'Select event' dropdown menu. The dropdown is open, showing the following options:

- Account details & unassigned licences
- Account details & unassigned licences
- \$Template Exhibition

A red arrow points from the top of the page down to the 'Account details & unassigned licences' option in the dropdown menu.

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

Manage data

The screenshot shows the 'Manage data' interface with the following summary data:

SMARTLEAD	16	51	1	2	0
	DEVICES	LEADS	SECTORS	COUNTRY	HOT

Below this is a 'Select event' dropdown menu with the value '\$Template Exhibition'. There are tabs for 'Contacts' and 'Devices'. The 'Contacts' tab is active.

There is a search bar with the text 'Enter text to search...' and buttons for 'Search' and 'Clear'.

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

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PAGE SIZE 10 20 50 ALL

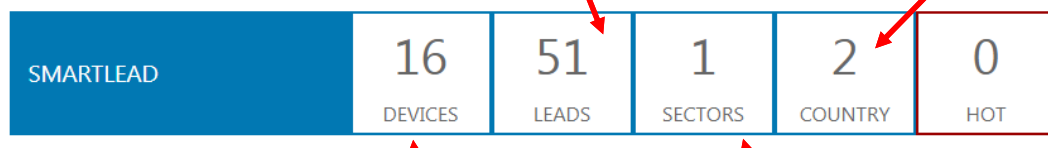
EXPORT TO EXCEL

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

3. Key to SmartLead bar.

How many countries your contacts are from.

Manage data



Number of contacts collected.

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
	Organisation
	Address #1
	Address #2
	Address #3
	Town/City
	County/State
	Postcode/Zip
	Country
	Cell/Mobile #
	Email Address
Visitor type	Badge Type
	Barcode
Interest in gap year	CONSIDERING GAP YEAR
Interest in employment	CONSIDERING STRAIGHT EMPLOYMENT
Interest in apprenticeships	CONSIDERING STUDYING APPRENTICESHIP
Interest in conservatoires	CONSIDERING STUDYING CONSERVATOIRE
Interest in studying overseas	CONSIDERING STUDYING OUTSIDE UK
Study year	Current School Year
	Date of Birth
Preferences collected by UCAS when a visitor registers for UCAS communications.	DP Learner Communications Type
Shows the preferences that the visitor has opted into if scanned. Note that onsite registrations would not have	DP Scanner Preferences

this field completed but give permission to be contacted by email by being scanned. More info detailed in ‘Understanding how you can use data from scanning at UCAS exhibitions’	
	Gender
	Parent Post 18 Options
	School Name
Year that student would like to start studying	Start University Year LEARNER
	Study Regions
Subjects in priority order	Subject Interested 1
	Subject Interested 2
	Subject Interested 3
Subjects currently studying	Subject Studying 1
	Subject Studying 2
	Subject Studying 3
Tags in the SmartLead UCAS app. You can use these to collect your visitors’ preferences. The file displays answers ‘Y’, ‘N’ or blank to match SmartLead UCAS app functionality.	Email opt in
	SMS opt in
	Post opt in
	Unused 4
	Unused 5
	Unused 6
	Unused 7
	Unused 8
	Unused 9
	Unused 10
	Notes

[You can download the sample report \(which includes all fields\) from here.](#)

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 no later than 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. Unresolved barcode

- For visitors who’ve registered on-site, your data will appear in your ENet account within two working days after the event, if sufficient data has been provided on the form. The barcode should appear as green and processed in your ENet account.
- The barcode may be damaged – try rescanning.
- The lighting may be poor. Turn on your flash when in camera mode

- The camera specification may not be sufficient (minimum of five megapixels needed). You could use a hire device, if available, at £10 per device.
- 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.
- If you see the error code 'Wrong event', the barcode is for a different event. Log a request with eventstechnical@ucas.ac.uk, and we should be able to assign the data to your ENet account.

3. My barcode won't scan?

- If it is paper, make sure the complete barcode has scanned – try re-scanning.
- If it's a mobile ticket, and the visitor has a cracked screen, try turning the phone around so the barcode moves to a different part of the screen. If it still does not scan, send them to register on-site, and collect a new barcode.
- You may need to adjust the brightness on the device, for the barcode to scan, or turn on the flash light when in the camera scan mode.
- If the phone has a screen protector, it may affect scanning.

4. Wrong event error

- Check your home screen shows the event that you're attending. If your device is assigned to the wrong event, you will have barcodes that are unresolved or in error.
- Check the visitor has registered for this event. Send them to complete an on-site registration, and collect a new barcode if not.

Scanning an exhibitor pass will no longer assign you to the wrong event.

- **5. Scans not matching contacts**

Scans are the number of barcodes scanned. Contacts are the number of individual and unique contacts who should pull through to your ENet account. If you're using an old version of the app, you may experience issues. Make sure you have the latest version before each event.

6. Internet connectivity

You should use the app online whenever possible, unless we report a connectivity issue – we would then advise you scan offline. If you've scanned offline, ensure you connect to the internet, and sync your data post-event. Please check you have all your data in your ENet account before resetting your device.

Note: Each event exhibitor manual provides details of WiFi availability.

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 synchronised, and not lost. You can update the app from the app store, but please ensure all contacts are synchronised in the app before doing so, so you don't lose your data. Do not update the app if you have already entered a licence code, as this will make the licence stop working.

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 invalid barcodes, then they will turn grey. You may see some unresolved barcodes until your data is synchronised. You will 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. Error log

Available at the top right of the sync screen, there is an option to submit an error report if you're experiencing issues.

11. Improved two-stage sync

Hold down the 'Sync' button for longer, to force the app to re-sync if you think you're missing any data. A quick press on the 'Sync' button will update the latest scans – the status of barcodes will then update to 'Processed' or 'Invalid'.

12. Restricted barcode scanning

You 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'.

13. 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.

14. Invalid barcode

An invalid barcode could mean that:

- an exhibitor pass has been scanned
- a barcode not for our event
- a barcode has been partially scanned, so does not have the right number of digits matching a record

15. Mobile hotspot/tethering

Please avoid using mobile phones as a hotspot, as this can interfere with the WiFi connectivity and scanning service.

16. Date of birth (DOB)

A small number of records appear with a DOB of 01/01/0001, due to visitors clearing the field after entering the data. This issue has now been fixed, but any DOB fields that are incorrect can't be reversed. You may still receive DOB fields that are empty if the data is from an on-site registration, or from data collected prior to the fix.

17. Reset your app

Reset your app after each event once you're sure the data is synchronised – the app works better if it not have residual event data.