


## Instructions on setting up and managing data scanning Moray 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.

<b>Prior to the event</b>	
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.	
<b>At the event</b>	
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](mailto: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.**

The screenshot shows a navigation bar with the following items: Home, Service provider reports, Shop, Manage stand, Data scanning, Account, and Sign out. A dropdown menu is open under 'Data scanning', showing three options: 'About data scanning', 'Order data scanning', and 'Manage data'. The 'Manage data' option is highlighted in blue. Below the navigation bar, the 'Home Page' content is visible, including a welcome message and descriptions for 'Shop', 'Manage stand', 'Data scanning', and 'Account'.

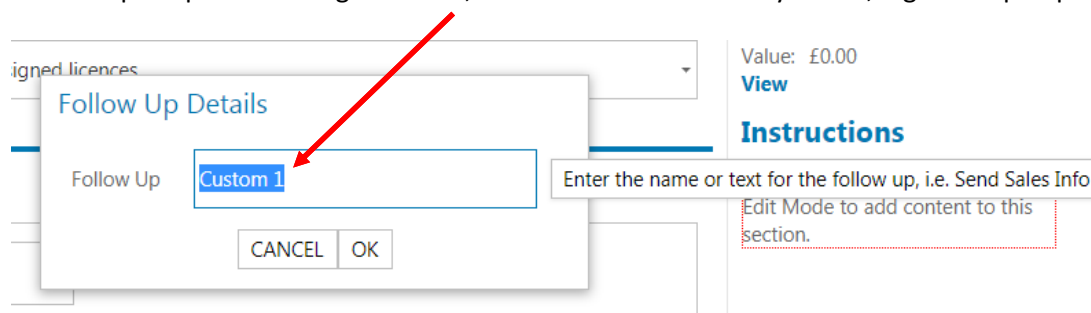
- You'll automatically be directed to the **Tags** area, where you'll see that opt in tags have already been set up for you (these cannot be changed). Using these tags, you can ask those you scan what their communication preference is, and easily record their answer. There are an additional seven tags 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.

The screenshot shows the 'Manage data' page. At the top, there is a 'SMARTLEAD' header and a row of five statistics: DEVICES (0), LEADS (0), SECTORS (0), COUNTRY (0), and HOT (0). Below this is a 'Select event' dropdown menu with 'Account details & unassigned licences' selected. The 'Tags' tab is active, and the 'Unassigned Licences' tab is also visible. A 'Key:' section with an 'ab' icon and 'Edit the description' text is present. Below this is a search bar with 'Enter text to search...' and 'Search' and 'Clear' buttons. A table lists the tags:

#	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	

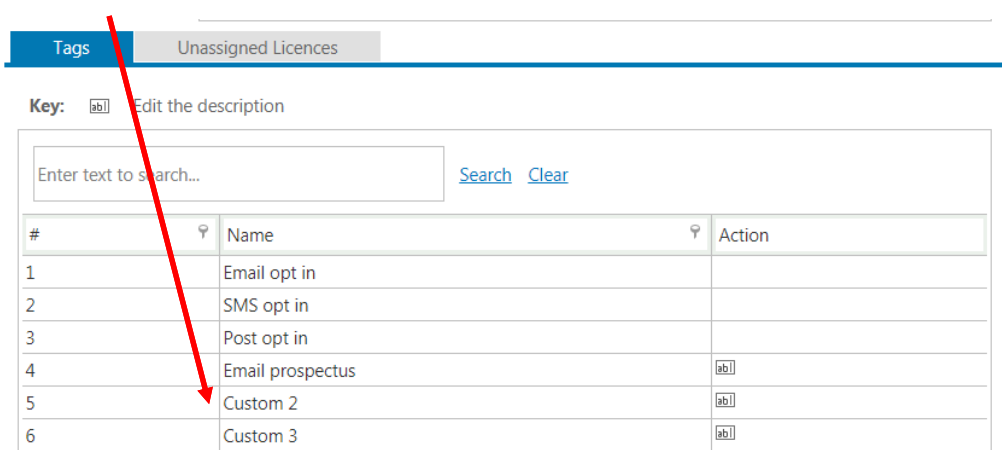
Click this **ab** icon to change the tag titles.

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](https://ucas.com/exhibitions) for:

- preparation tips

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

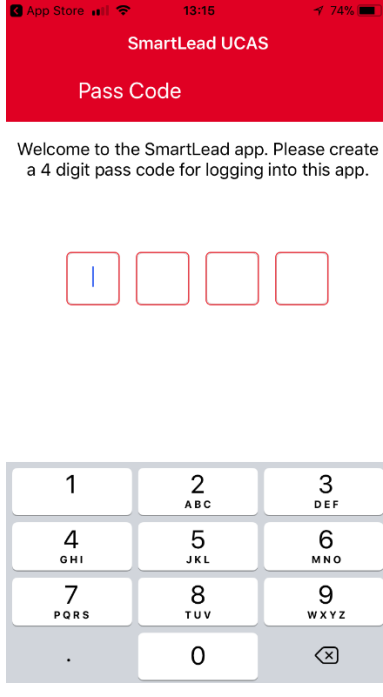
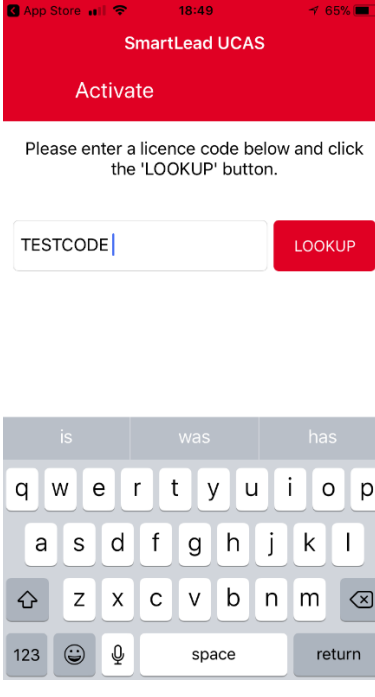
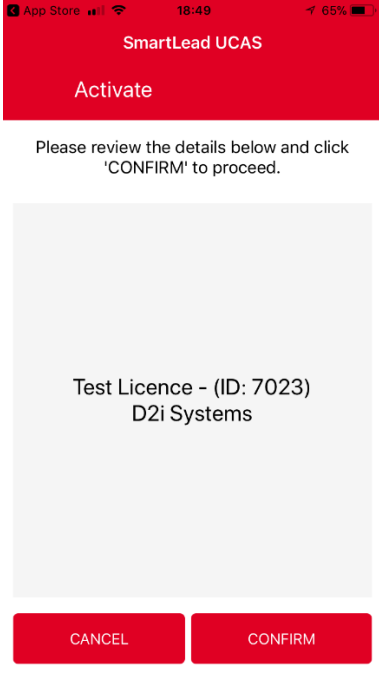
## 2. Downloading and setting up the app

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.

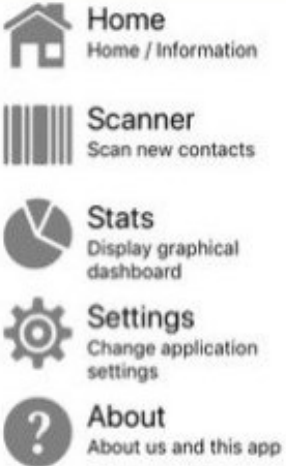
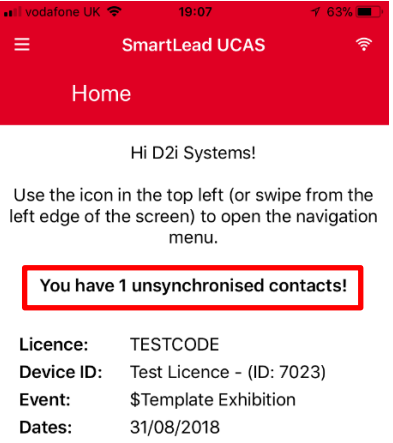
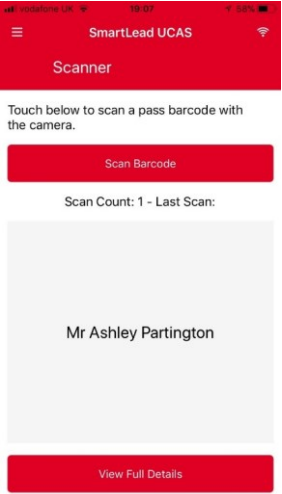
New: iPad and iPhone versions of the app are now available.

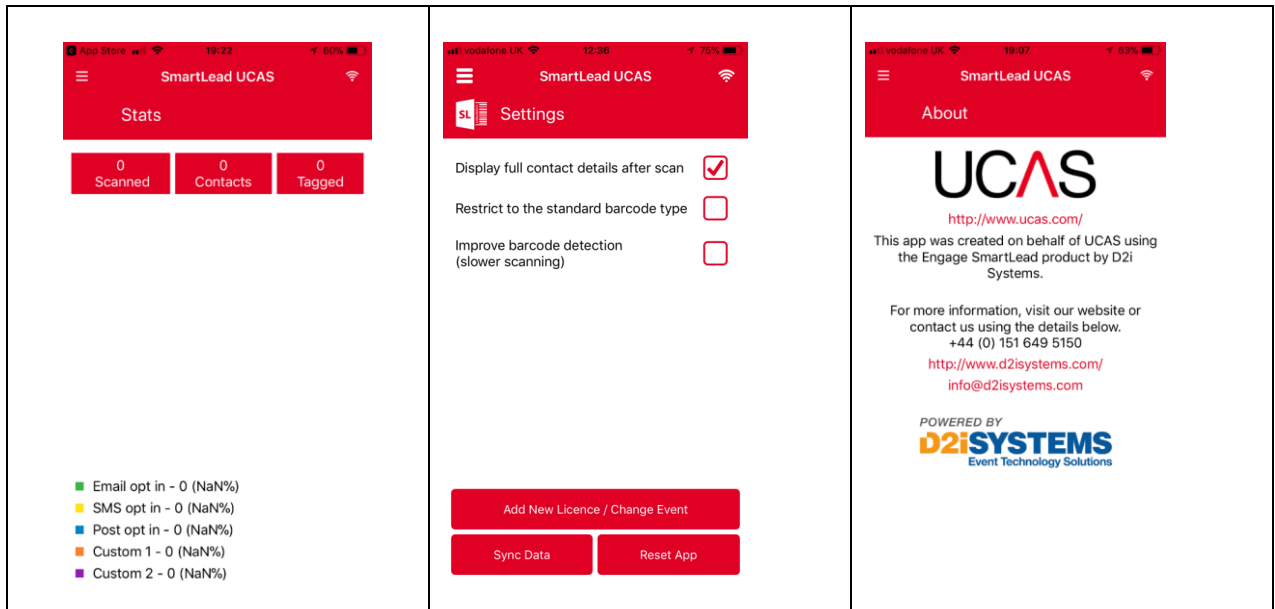
**Note:** As a minimum requirement, your device needs to use operating system Android 8 or iOS 7, and should have at least a five mega pixel camera (the better the camera, the more reliable the scan).

### 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"> <li>• the licence you're using</li> <li>• your device ID</li> <li>• the event you're attending</li> <li>• the dates of the event</li> <li>• how many unsynchronised contacts you have</li> </ul>	<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"> <li>• synchronise your data – when you click the 'Sync data' button, you'll see a scan log detailing all of your barcodes</li> <li>• change event</li> <li>• reset your app (not recommended)</li> <li>• restrict the standard barcode type</li> <li>• improve barcode detection (slower scanning)</li> </ul>	<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	

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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.


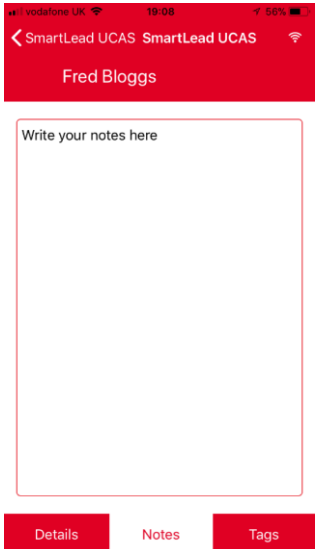
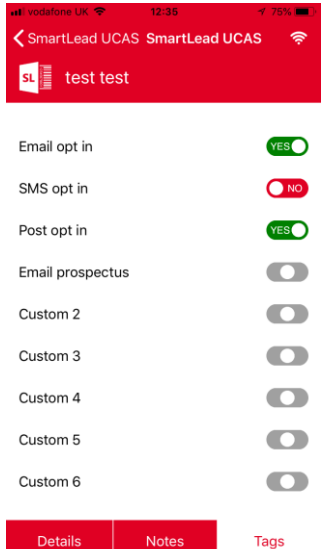
2. A sample delegate barcode is provided for each event, which should be the first one you scan after entering your licence code. This barcode is event specific. Once scanned, this will ensure all your data goes into your account, rather than the test account.

As a reminder, the barcode for the Moray 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**.

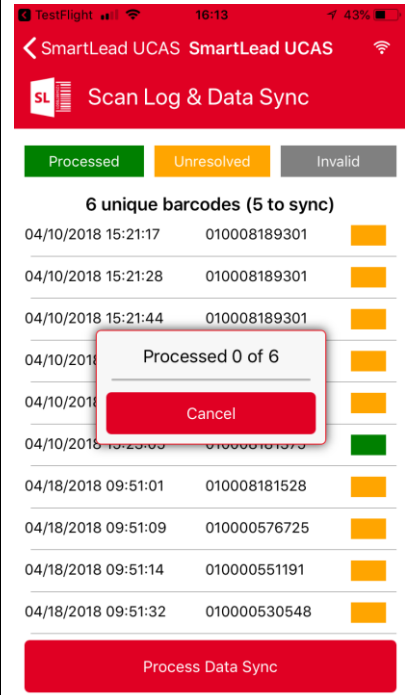
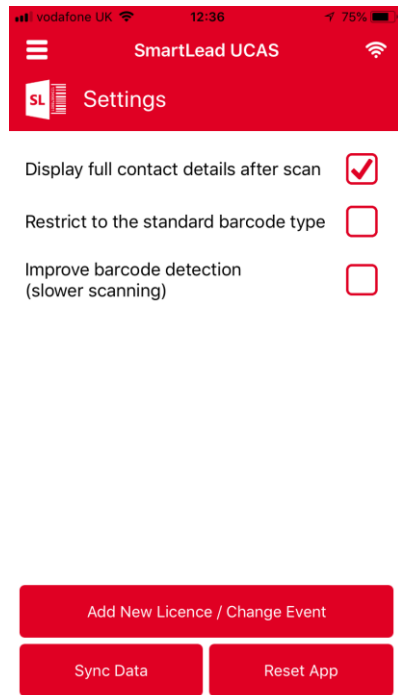
1. Details	2. Notes	3. Tags
<p>The details page loads with all the key information about the last visitor scanned.</p>	<p>The notes page allows you to write notes about the visitor, for your reference.</p>	<p>Three default tags have been set up for you to manage your visitors' preferences. Seven tags 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 bar containing 'Un'. The dropdown list shows 'Account details & unassigned licences' (highlighted in blue) and '\$Template Exhibition'. A red arrow points from the dropdown menu to the 'HOT' count 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 '\$Template Exhibition' selected. The 'Contacts' tab is active, and the 'Devices' sub-tab is selected. A search bar contains 'Enter text to search...' with 'Search' and 'Clear' buttons. Below the search bar is a table of data:

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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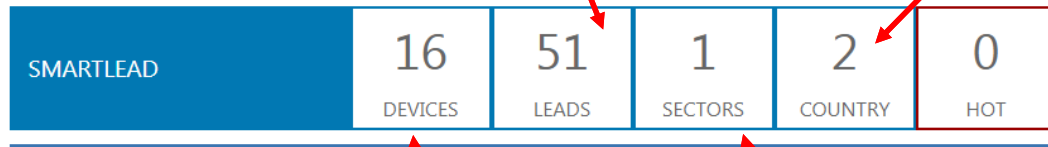
PAGE SIZE 10 20 50 ALL

EXPORT TO EXCEL

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

3. Key to Smartlead bar.

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.  From August 2018, file displays answers 'Y', 'N' or blank to match new SmartLead UCAS app functionality.	Email opt in
	SMS opt in
	Post opt in
	Custom 1
	Custom 2
	Custom 3
	Custom 4
	Custom 5
Custom 6	
	Custom 7
	Notes

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

[www.ucasmedia.com/content/exhibitions-2018](http://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.