

Manual for setting up and managing data scanning.

Updated 28 February 2024

To ensure you get the most from UCAS' data scanning service, please review the below sections:

1. Checking you have a compatible scanning device - minimum requirements.
2. Personalising your scanning data.
3. Downloading and setting up the Smartlead UCAS app.
4. Managing data scanning at each event.
5. Accessing and downloading your scanning data.
6. Frequently asked questions.
7. Technical support.

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

Prior to the event	
Check you have a compatible device and camera (see 'Scanning device - minimum requirements').	
In your ENet account, update any additional opt ins you wish to include (Tags) before each event (see 'Personalising your scanning data').	
Download the Smartlead UCAS app to all devices to be used for scanning. Update the app prior to each event season or when prompted.	
Login to each device with your email address (any email is fine) and password (which is one of your unique licence codes).	
At the event	
Enter your unique licence code if you have not logged in as above (see 'Managing data scanning at each event').	
Scan the event specific QR code (see 'Scanning instructions per event') to assign your licence code to an event.	
Check the homepage of the app, to ensure the event name and date(s) are correct (see 'Downloading and setting up the app').	

1. Scanning device - minimum requirements

- Minimum operating system Android 8 or iOS 7.
- Minimum five-megapixel camera – the better the camera, the more reliable the scan).
- Camera must 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 issues with Android tablets, including, Galaxy tabs.
- Please get in touch before purchasing devices to ensure compatibility.

2. Personalising your scanning data

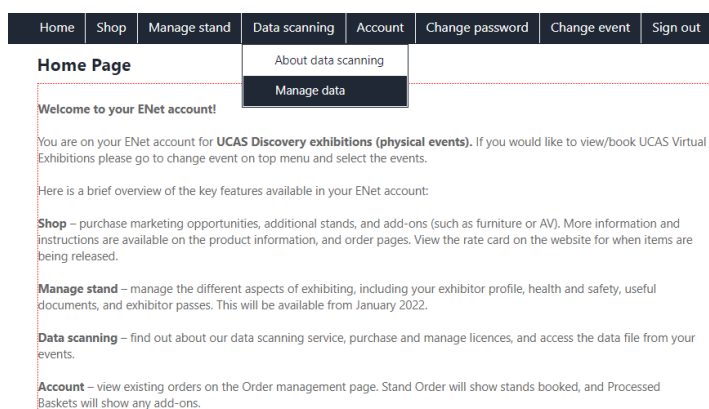
In addition to those already predefined by UCAS' event registration process, you can set up your own additional tags in your ENet account. These can determine your own, ongoing communication with those you scan.

What is a Tag?

A 'tag' is an area of interest that you can assign to a person you have scanned e.g. you could ask if the student wants to receive a prospectus and select yes in their profile after scanning.

How to setup Tags

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



- You'll automatically be directed to the **Tags** area. Opt in Tags have already been set up for you (these cannot be changed). Using the Opt in Tags are optional. UCAS collects communication preferences on your behalf, any communication tags you add will supersede those collected by UCAS.

Manage data

SMARTLEAD	3	0	0	0	0
	DEVICES	LEADS	SECTORS	COUNTRY	HOT

Select event: Account details & unassigned licences

[Click here](#) to manually upload barcodes.

Tags area

Tags Licences

Key: Edit the description

#	Name	Action
1	Email opt in	
2	SMS opt in	
3	Post opt in	
4	Brochure request	
5	Not Specified	
6	Not Specified	
7	Not Specified	
8	Not Specified	
9	Not Specified	
10	Not Specified	

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

- Click on the **ab** icon and you will be prompted to change the name, e.g. email prospectus. Then click ok.

- This will then update your list and your app.

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	Brochure request	

- You can ask those you scan, their communication preference, and easily record their answer using these Tags (you do not have to). These opt in Tags, if used, would override the preferences we collected for you when the person registered.
- There are seven Tags for you to customise for specific preferences e.g. receive a prospectus.
- You must reset the app on your phone/tablets once you have customised your tags to apply them to your app. Please add/change any Tags before signing into the app or adding licence codes.

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

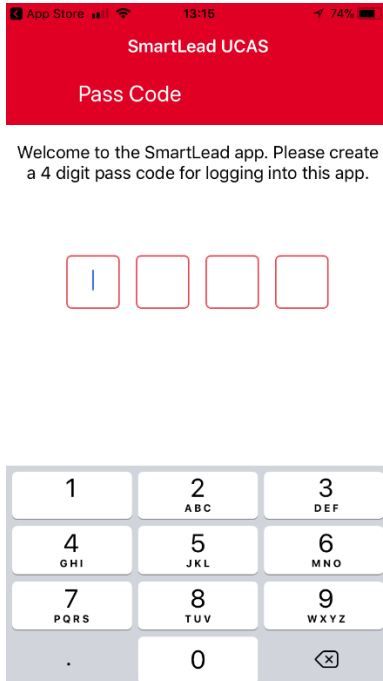
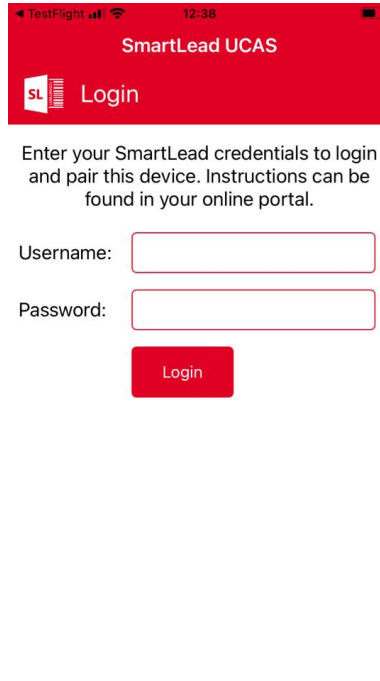
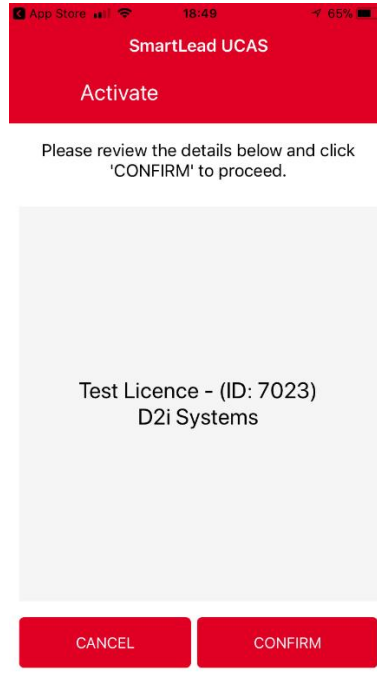
3. Downloading and setting up the app

Download the SmartLead UCAS app used for data scanning at our UCAS exhibitions.


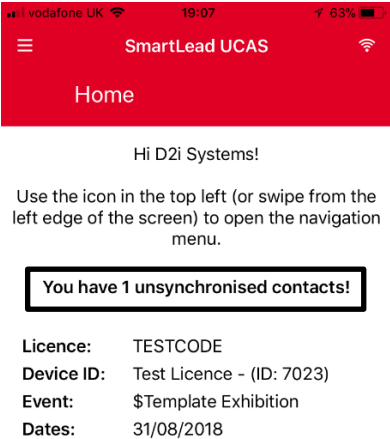
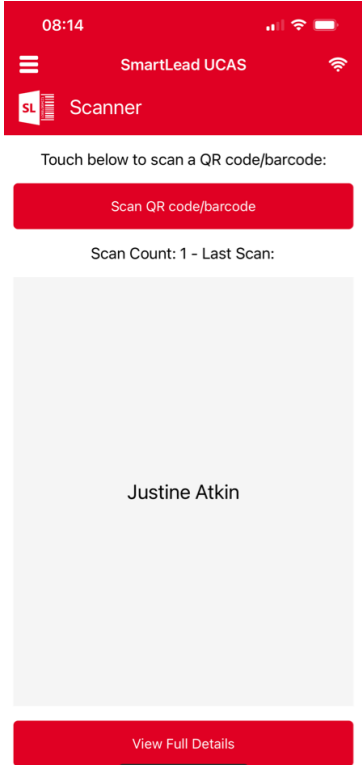
You can download it from the Google Play Store or Apple App Store. Android, iPad, and iPhone versions of the app are available.


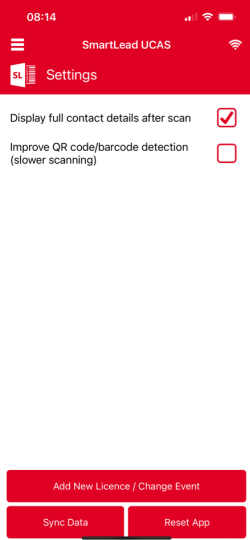

Please make sure you have the latest version of the app before arriving on-site.

To set up the app

1. Create a passcode	2. Enter your details	3. Confirm
<p>Choose a four-digit pass code, which can be used to sign into the app on your chosen device. If you forget your pass code, you can contact your lead Booker or UCAS to access it via your organisations ENet account.</p>	<p>Enter your username (your email address) and password (unique licence code), 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. Note: You will need to scan the event specific QR code found in the scanning instructions provided at the event or via the Exhibitor zone before you start scanning.</p>
 <p>The screenshot shows the 'Pass Code' screen of the SmartLead UCAS app. It features a red header with the app name and a white background with the text: 'Welcome to the SmartLead app. Please create a 4 digit pass code for logging into this app.' Below the text are four empty square boxes for entering the passcode. At the bottom, there is a numeric keypad with digits 1-9, 0, a period, and a backspace key.</p>	 <p>The screenshot shows the 'Login' screen of the SmartLead UCAS app. It features a red header with the app name and a white background with the text: 'Enter your SmartLead credentials to login and pair this device. Instructions can be found in your online portal.' Below the text are two input fields labeled 'Username:' and 'Password:'. A red 'Login' button is positioned below the password field.</p>	 <p>The screenshot shows the 'Activate' screen of the SmartLead UCAS app. It features a red header with the app name and a white background with the text: 'Please review the details below and click 'CONFIRM' to proceed.' Below the text is a grey box containing the text: 'Test Licence - (ID: 7023) D2i Systems'. At the bottom, there are two red buttons labeled '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 is not an exit button in the app.</p>	<p>This page shows you:</p> <ul style="list-style-type: none"> • The licence you are using. • Your device ID. • The event you have assigned to the licence code entered. • The dates of the event • Number of unsynchronised contacts. 	<p>This page provides all the key information about the last visitor to be scanned.</p>
		

Stats	Settings	Need Support?
<p>Track your scanning stats here. Note: the coloured bullets will relate to the Tags you are using.</p>	<p>Use this section to:</p> <ul style="list-style-type: none"> • Sync your data – click the ‘Sync data’ button to see a log of all your scans and status. You can sync all scans here too; • Change event. • Reset your app (only if all data has been synchronised). • Restrict the standard barcode type (make sure this is turned off). <i>Removed for 2024 app update.</i> • Improve QR code/barcode detection. 	<p>Information to support you using the app.</p> <p>For Technical Support 01242 545725 Eventstechnical@ucas.ac.uk</p> <p>Click the www.ucas.com link for Scanning FAQs</p> <p>Information about the app provider and UCAS.</p>
 <p>■ Email opt in - 0 (NaN%) ■ SMS opt in - 0 (NaN%) ■ Post opt in - 0 (NaN%) ■ Custom 1 - 0 (NaN%) ■ Custom 2 - 0 (NaN%)</p>		

4. Managing data scanning at the event

- Each device used for scanning should have a unique licence code per event duration (licence codes are not transferable to different devices).
- Licence codes can be found in the 'Manage data' section of your ENet account, a different code is needed for each event.

You must activate a licence by adding it to the SmartLead UCAS app and scanning the event QR code provided in the scanning instructions for each event.

Once scanned, this will ensure all your data goes into your Enet account. **Do not** scan your exhibitor badge as this will render your licence code invalid.

- To find your allocated licence codes, login to your Enet account, go to **Data scanning > Manage data > 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

[Click here](#) to manually upload barcodes.

Tags Licences

Key: Set the friendly name for the device

Device ID	Licence Code	Friendly Name	PIN	Event	Contacts	Action
33046	1F2C59D1	Smartlead Device		Unassigned	0	
33051	D0BF4B63	Smartlead Device		Unassigned	0	
32990	06C3D64F	Smartlead Device	1234	Unassigned	0	

PAGE SIZE: 10 20 50 ALL


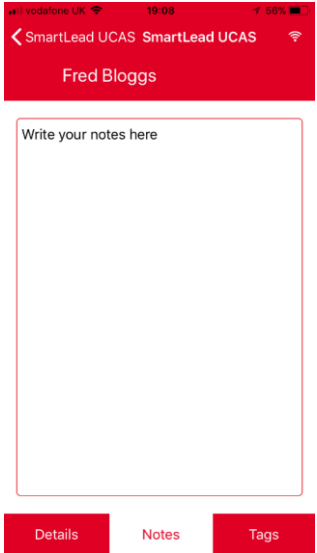
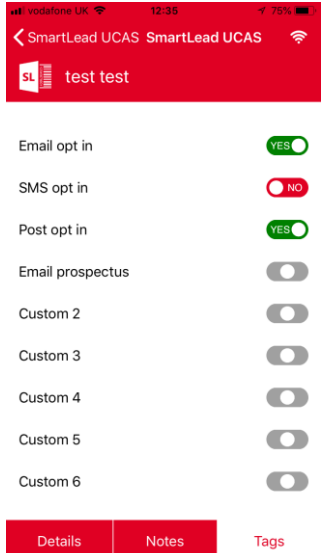
A **licence code** is needed for each device and is only used for one event (however many days it lasts).

The PIN/Pass code 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 needed.

Click this **abl** icon to change the **Friendly Name** of the licence. You can match the licence name to the event and user, e.g. David Smith Bristol.

Scanning attendees

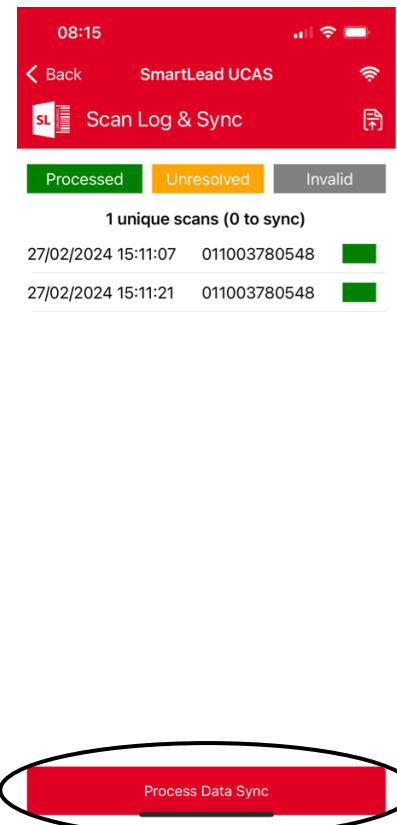
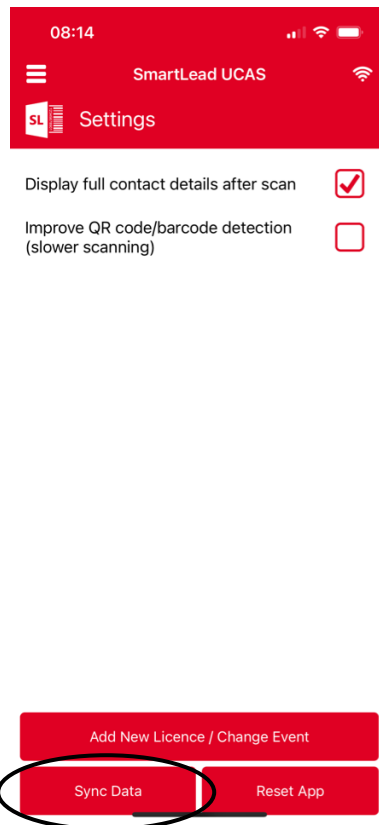
- Select the **Scanner** option on the menu.
- This page will provide a view of the last person scanned.
- You can **view full details** of the last person scanned.
- Click **scan QR code/barcode** to scan your next QR code.
- Once you scan the QR code, you'll see a page containing the visitor details, as shown in the image 1 below.
- Images 2 and 3 show how to add additional information for the scanned visitor.
- If you'd like to scan another QR Code, click the back arrow in the top left-hand corner, and click **Scan QR code/barcode**.

1. Visitor 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 (if you choose to use them) tags have a Yes (green), No (red) or unselected (grey) option.</p>
		

Synchronising data

Data will not sync unless you have an internet connection. To push your device to sync:

- Go to the menu!
- Click **Settings**
- Click **Sync Data**
- Click **Process Data Sync**
- Hold the **sync** button for longer to force another sync.
- Your QR code numbers should be green or grey if they have all synced.

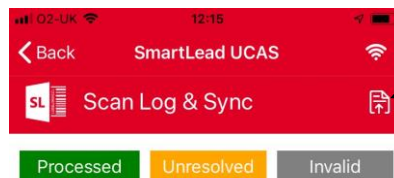


Error log

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.

Please also report to the event organisers.



Error log

5. Accessing and downloading data

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 your events.

The screenshot shows the 'Manage data' section with SMARTLEAD statistics: 1 DEVICES, 9 LEADS, 1 SECTORS, 1 COUNTRY, and 0 HOT. Below this is a 'Select event' dropdown menu with options: 'UCAS Discovery exhibition Aberdeen 2022', 'Account details & unassigned licences', 'All Events', 'UCAS Discovery exhibition Aberdeen 2022', and 'UCAS Discovery exhibition Ayrshire 2022'. A red box highlights the 'HOT' value, and a black arrow points to the 'UCAS Discovery exhibition Aberdeen 2022' option in the dropdown.

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

The screenshot shows the 'Licences' tab with a search bar and a table of data. The table has columns: Date, Device, First Name, Last Name, Organisation, and Country. The data rows show multiple entries for 'Aberdeen test (36134)' with names 'Test' and 'Tom Paterson' from 'UCAS TEST 1' in the 'United Kingdom'. At the bottom right, it says 'PAGE SIZE 10 20 50 ALL'.

Export Contacts

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

Key to SmartLead bar

Manage data

SMARTLEAD	2	267	1	2	0
	DEVICES	LEADS	SECTORS	COUNTRY	HOT

- Devices - Number of devices already used and linked to your account.
- Leads - Number of contacts collected.
- Sectors - This will always be one, as we have only one sector.
- Country - How many countries your contacts are from.

6. Frequently asked questions

How do I login to my ENet account?

The booker and secondary (alternative contact) for your event bookings have been allocated an Enet account. www.ucas.com/enet can be used to access the ENet online portal.

Wi-fi

Details of the Wi-Fi service at the venue can be found in the exhibitor manual and scanning instructions for each event.

Forgotten pin

The PIN can be found in your bookers ENet account in the last event that your SmartLead UCAS app was used.

Red screen when trying to scan

Another app is using your camera. Close all apps on your device (including the Smartlead app) and then reopen the Smartlead UCAS App.

No internet or bad signal

You can scan offline, provided you have already activated your licence code and scanned the unique event QR Code to assign the licence code to the event. Check the home screen displays the correct organisation, event name and date. If scanning offline, you must sync your data after the event to upload your scans to your Enet account.

How do I sync my data?

Whilst connected to the internet, go to 'Settings', 'Sync data' and hold down, 'Process Data Sync'. This will ensure that all data is pushed to your Enet account.

What QR codes/barcodes have scanned?

View the scan log to see what QR codes/barcodes you have scanned and their status:

- Green – QR code/barcode is processed and synced.
- Yellow – Unresolved – not synced to your account.
- Grey – Invalid and has not scanned the complete QR code/barcode

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.

Improved QR code/barcode detection

This setting gives the best chance of capturing a QR code/barcode by offering a longer exposure. This is helpful if there is poor lighting.

My QR code/barcode does not scan/unresolved QR code/barcode

- Try scanning again.
- Check the home screen displays the correct organisation name, event and date for the event you're attending.
- The QR code/barcode may be blurred or damaged, there may be a screen protector or a cracked screen.
- If the screen is cracked, try turning the phone around so the QR Code/barcode moves to a different part of the screen.

- If you cannot use the QR code/barcode at all, send them to register on-site and collect a new QR code.
- The camera specification may not be sufficient (minimum of five megapixels needed).

Can't scan a QR code/barcode?

Take a photograph of the QR code/barcode including the person's name and the QR code/barcode number and email it to events@ucas.ac.uk, we will add these lead details to your Enet account where possible.

Why can't I see personal details when I scan

If you are scanning offline, you will not see details. Also, details of on-site registrants using a paper registration form will not appear when scanned, the data will be available in your Enet account within two working days, if enough data is provided on the form.

Scans not matching contact stats

Scans are the number of times you have scanned. Contacts are the number of individual contacts you have added to your Enet account.

Why do I have opt-in 'tags'?

The pre-defined opt-in 'Tags' are for you to collect additional preferences should you wish, but are not mandatory, UCAS already collect these for you. Any options you collect will override preferences UCAS has collected. You may also programme up to seven of your own options in Enet prior to the event. E.g. send a prospectus.

Data error

This is due to a lack of internet data on the device if using 4g. The user can either turn off all internet connections and sync at the end of the event, switch to wi-fi or top up their data.

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 QR codes/barcodes that are unresolved or in error.
- Check the visitor has registered for this event. If not, send them to complete an on-site registration form and collect a new QR code.
- If you see the error code 'Wrong event', the QR code/barcode is for a different event. You will need to add a new licence code and log a request with eventstechnical@ucas.ac.uk, and we should be able to assign the data to your ENet account. Do not reset your app.

Reset your app

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

7. Technical support

If you would like support with setting up your app or have any questions, please contact the UCAS Events Technical Team at eventstechnical@ucas.ac.uk or call 01242 545725