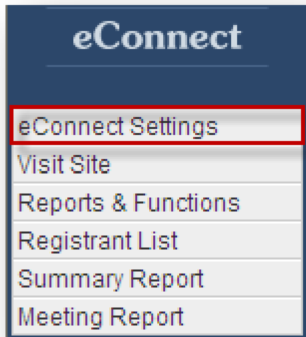
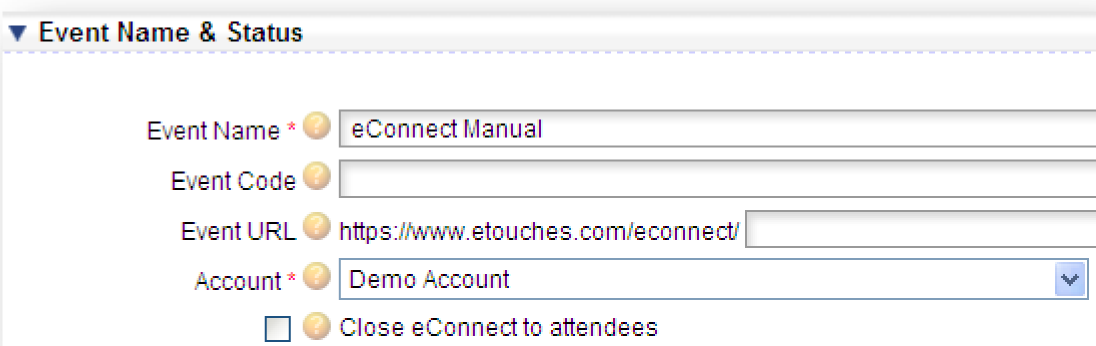
eConnect Manual

eConnect: The eConnect module allows you and your colleagues to manage meetings online and setup meetings with other users.



Basic Details: In the Basic details section you can edit the basic details about your event such as name & status, Schedule Date & Hours, and Available Meeting Locations.

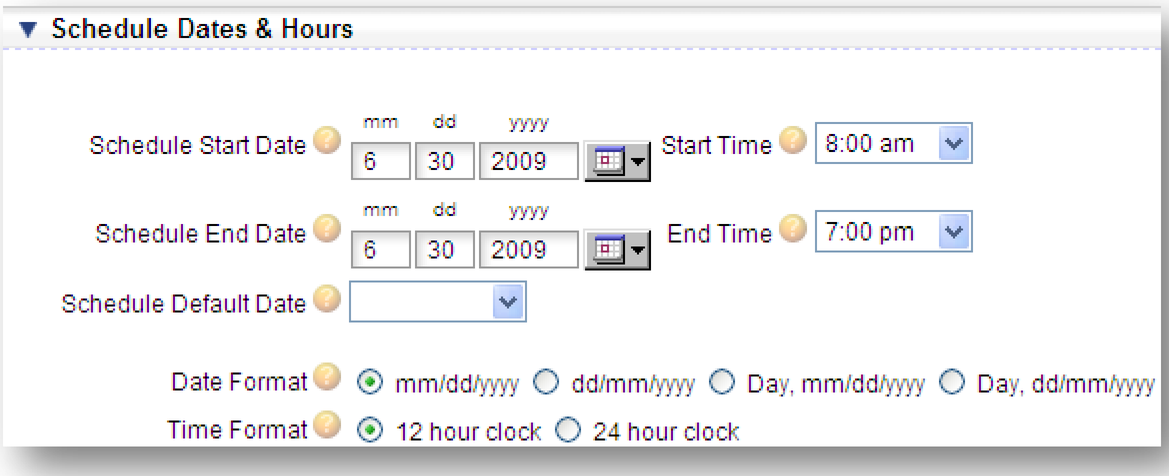
Event Name & Status:



Event Name: This is the name of your event as it will appear on the back end of the system when you are editing it.
Event Code: This is the reference code that you can assign to your event. This has no real bearing on registration, it is just there for internal purpose only.
Event URL: By default the link to your event will consist of the event ID number that the system assigned when you created your event. However if you would prefer to have a more relevant

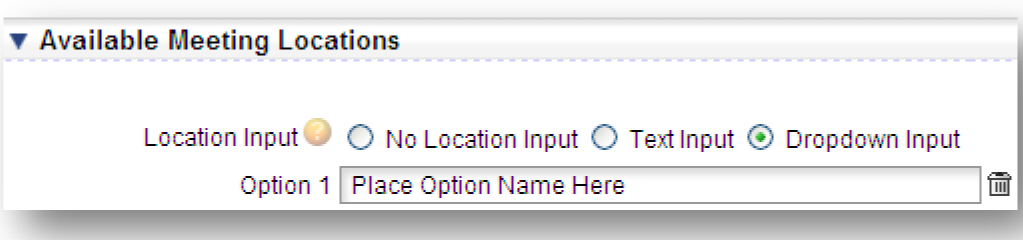
URL to give attendees, then enter the desired URL here. Please note your URL will always begin with .etouches.
Account: This is the account in which the event is placed. The account determines who has access to the event.
Close eConnect to attendees: Checking this box closes eConnect to your attendees, ensuring that no-body can login to the system.

Schedule Date & Hours:



Schedule Start Date & Time: This is the earliest date & time that your registrants can view on their eConnect Schedule.
Schedule End Date & Time: This is the latest date & time that your registrants can view on their eConnect Schedule.
Schedule Default Date: This is the date that your registrants will see when they initially log in to their eConnect schedule. If this field is left blank it will default to the schedule start date.
Date Format: Select whether your event dates will appear to registrants in US or European format.
Time Format: Select whether your event times will appear to registrants in 12 hour or 24 hour format.

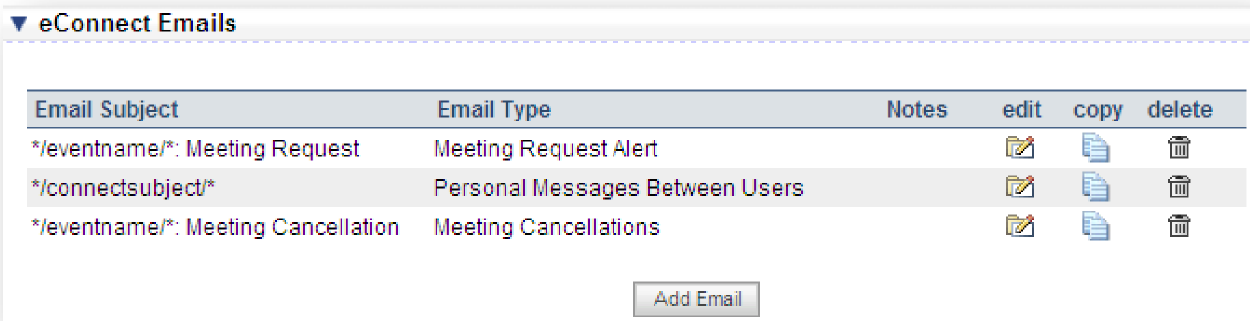
Available Meeting Locations:



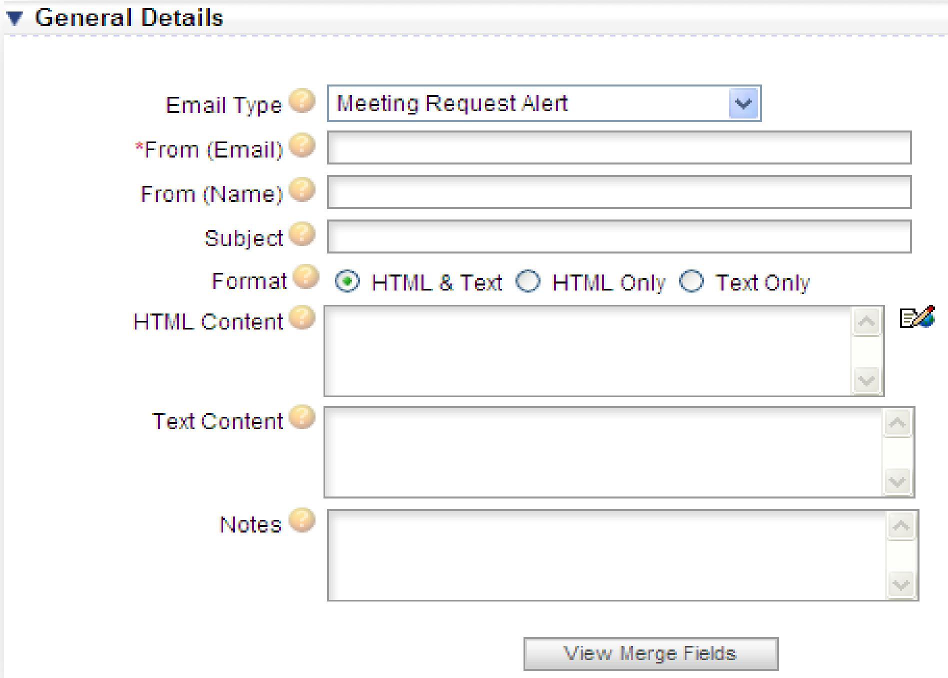
Location Input: Select if your registrants can enter a location when creating a meeting request, and if so then select the type they can use when choosing as shown above.

Email Templates: In the email templates section you can add eConnect emails that can automatically be sent to registrants. Here you will have three template emails to choose from or you have the option to add more emails.

eConnect Emails:



Adding an Email: By clicking this button you will open an email editor in a new window. In this window you will have the ability to edit the general details pertaining to this email as well as the email permissions.



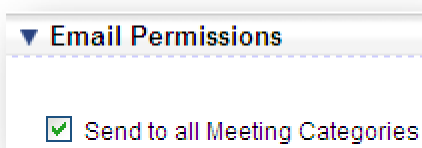
Email Type: Select which email template you are creating.
From (Email): Enter the email address of the person you want the email to come from. Remember that people may reply directly to this email, in which case it's best if this is a person who can assist them.
From (Name): Enter the name of the person you want the email to come from.
Subject: Enter the subject line of your email here. Make sure it is obvious what the email refers to otherwise it may well just be deleted by it's recipients.
Format: Use these radio button to select the format of the email: HTML, Text or both. HTML allows you to bold your text, insert images and generally make your email more lively, but on the downside not everyone can receive it, and it is a little more likely to be caught by spam filters. Text emails are functional- they cannot have any formatting other than new lines. Lastly you can send emails in both formats at once, and the user can see whichever version they prefer.
HTML Content: This is where you should insert the HTML version of your email.
Text Content: This is where you should insert the text version of your email.
Notes: These notes are for internal purposes only- use them to ensure you and your colleagues know the purpose of each email template.

View Merge Fields:

Subscriber Merge Fields: If you choose to add a merge field to your email, click the button labeled "View Merge Fields" located at the bottom right of the page. Once you click this button a small window will open that looks like the screen shot below. Locate the merge field that you want to insert into your HTML content. Then highlight it and copy the text. Once you have done this go back to your HTML content and past the text where you want it to appear within your email.

Miscellaneous Merge Fields: The unsubscribe link can be used for one of your recipients to unsubscribe from your mailing list. You can use this if you want to insert the link in another place in your email besides the default link at the end.

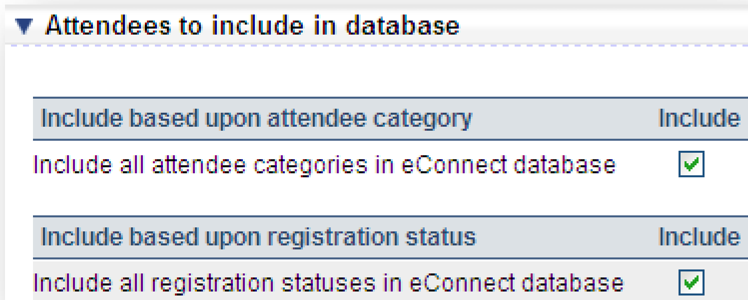
Email Permissions: If this box is checked under an email then the email will be sent to all meeting categories. When this is unchecked you'll see a list of your meeting categories- and you can then choose which of them should receive this email.



Please note that this setting does not apply for messages between attendees - since these don't have a category.

eReg Integration: This section allows you to adjust the integration settings such as login info, and visible registrant information.

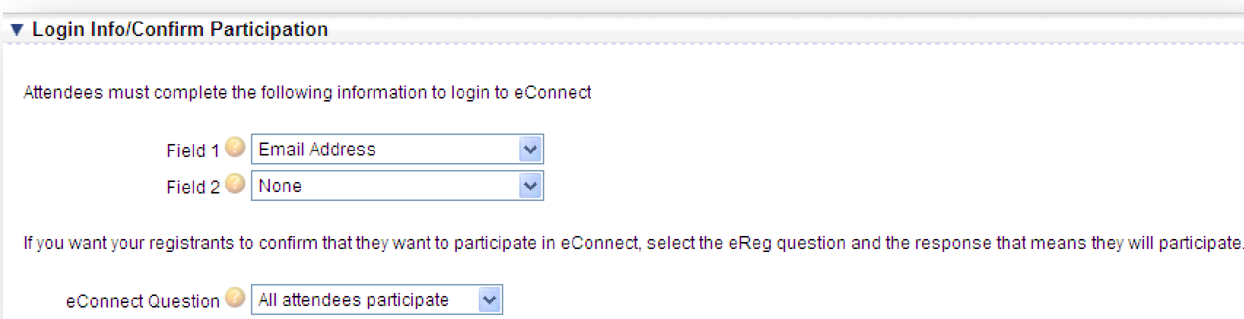
Attendees to include in database:



Include based upon attendee category: By checking this box all the attendee categories currently in eReg will be included in your eConnect database. If this box is unchecked then a list of the categories will appear below and you can manually select which categories you would like included.

Include based upon registration status: By checking this box all the attendee status' currently in eReg will be included in your eConnect database. If this box is unchecked then a list of the status' will appear below and you can manually select which status' you would like included.

Login Info/ Confirm Participant:



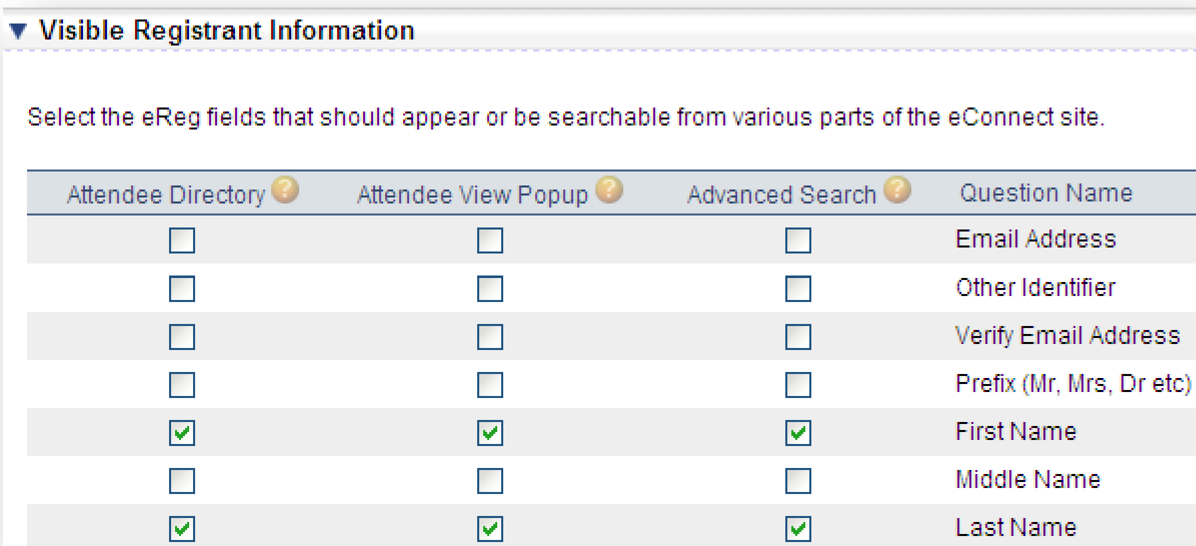
Attendee must complete the following information to login to eConnect:

Field One: Users will be required to enter the exact answers they typed when registering in order to login to eConnect.

Field Two: In order to improve eConnect security we recommend you require that your users enter a second piece of information in order to be allowed to login, although this is not compulsory. Users will be required to enter the exact answer they typed when registering in order to login to eConnect.

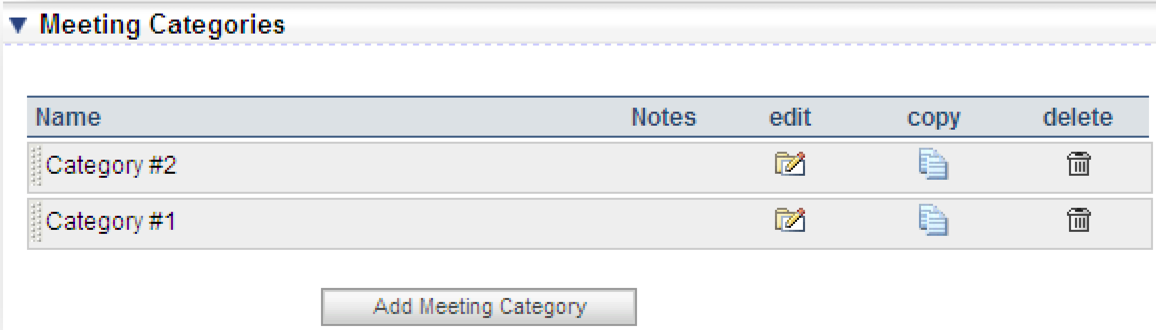
Confirming registrants will participate in eConnect: Here you will select which question in eReg will determine whether the registrant will appear in eConnect.

Visible Registrant Information:



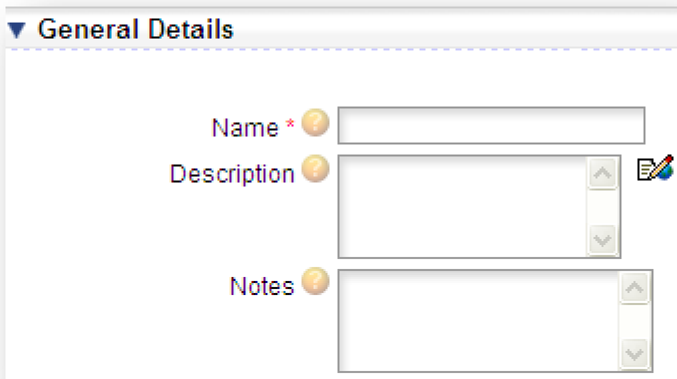
Attendee Directory: Check this box if you would like this field to appear as a column in the attendee directory.
Attendee View Popup: Check this box if you want this information to appear in the popup window when someone clicks on a registrant.
Advanced Search: Check this box if you want this information to be searchable from the advanced search window.
Question Name: This column displays the list of eReg fields that are available to choose from.

Meeting Categories: This section allows you to add/edit meeting categories. These categories are used to group your attendees.



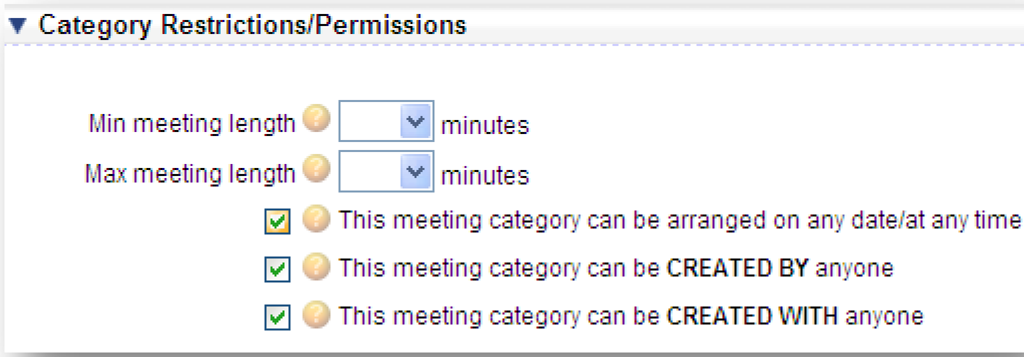
Add Meeting Category:

General Details:



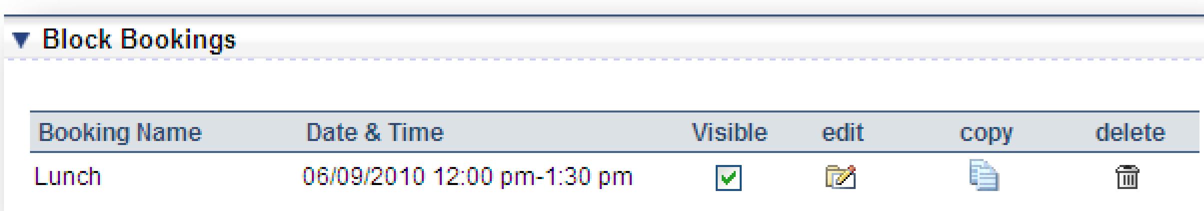
Name: Enter the name of the meeting category here- this will be visible to registrants. This could be something like "General Meeting" or "Sponsor Meeting."
Description: Enter a description of this category- your registrants will see this when selecting this meeting type and it will help them to know what it means.
Notes: These notes are for internal purposes only- use them to ensure you and your colleagues know the purpose of each email category.

Category Restrictions/ Permissions:



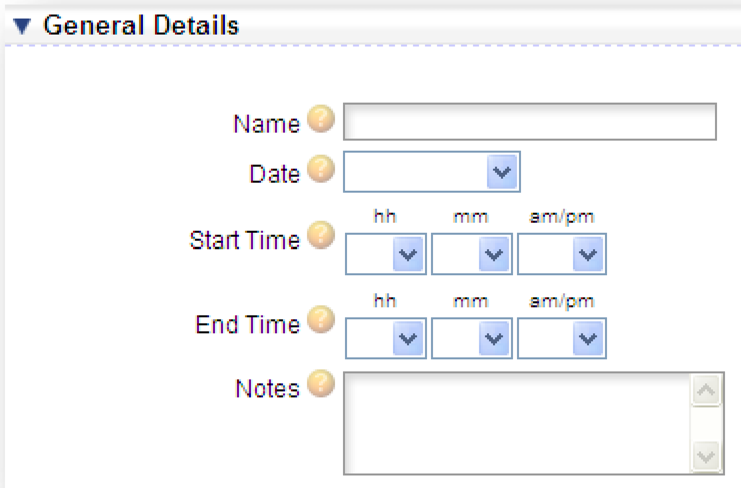
Min Meeting Length: Specify a minimum length in minutes for meeting requests of this category.
Max Meeting Length: Specify a maximum length in minutes for meeting requests of this category.
This Meeting category can be arranged on any date/at any time: Check this box if this meeting category can be arranged on any date or time (within the limits of your schedule)
This meeting category can be CREATED BY anyone: Check this box if this meeting category can be arranged by any attendee categories (from eReg)
This meeting category can be CREATED WITH anyone: Check this box if this meeting category can be arranged by any attendee categories (from eReg)

Block Bookings: This section allows you to block out particular times for certain attendee categories. These appointments will appear on the schedule and cannot be edited or deleted by the attendee.



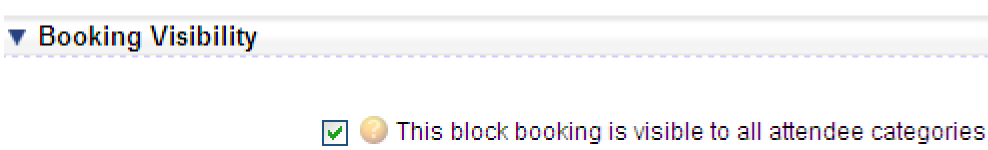
Add Block Booking:

General Details:



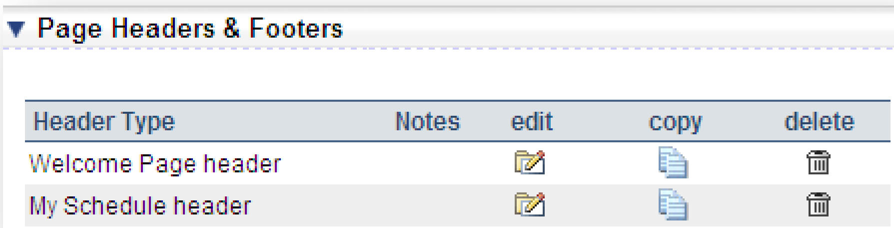
Name: Enter the name of the block booking- this will appear on your registrant's schedule so make sure it's descriptive.
Date: Select the date of this block booking
Start Time: Select the time that this block booking starts
End Time: Select the time that this block booking ends
Notes: These notes are for internal purposes only- use them to ensure you and your colleagues know the purpose of each block booking.

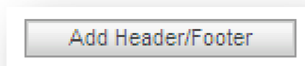
Booking Visibility:



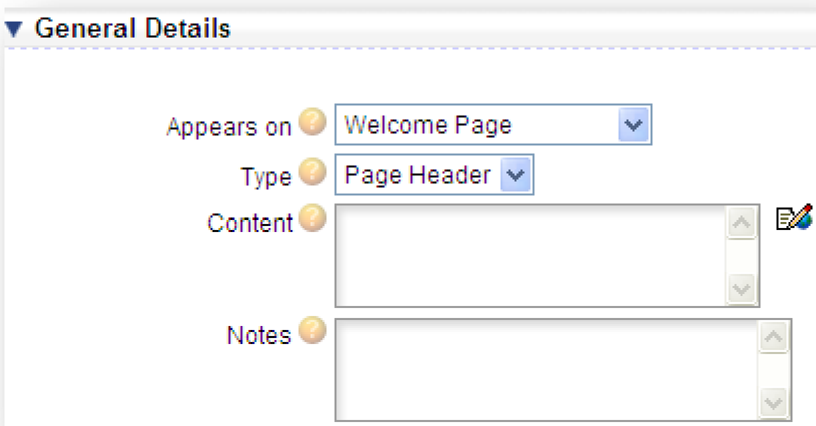
This block booking is visible to all attendee categories: Check this box if this block booking should be visible to all attendee categories from eReg.

Headers/ Footers: Here you can create headers/ footers for your eConnect site to either give directions, display images, etc.



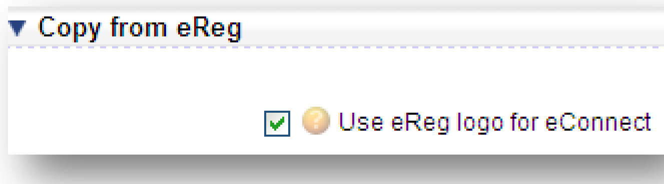


Add a Header/ Footer: Clicking this button will open a header/ footer editor where you can input the general details of your header/ footer.

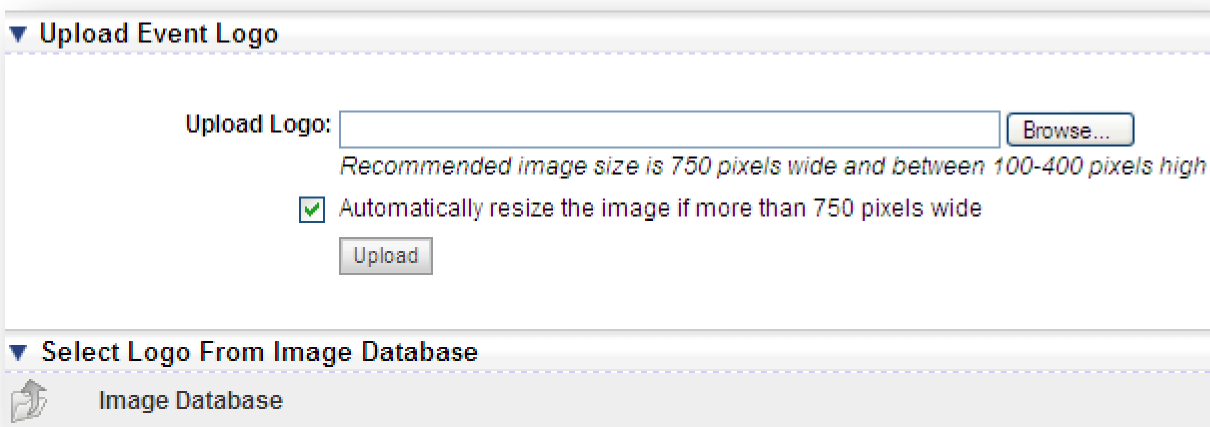


Appears On: Select which page of your eConnect site you want this message to appear on.
Type: Select if this is a header or a footer. Headers will appear above the rest of the content, footers will appear below.
Content: Enter the content that you want to appear here.
Notes: These notes are for internal purposes only- use them to ensure you and your colleagues know the purpose of each header/ footer.

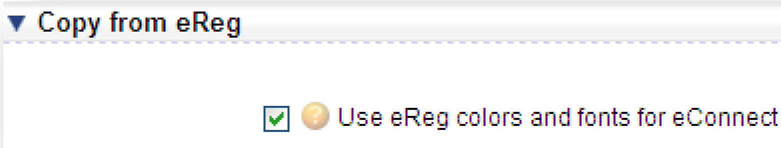
Event Logo: Here you can use the eReg logo or you can upload a logo for your eConnect site.



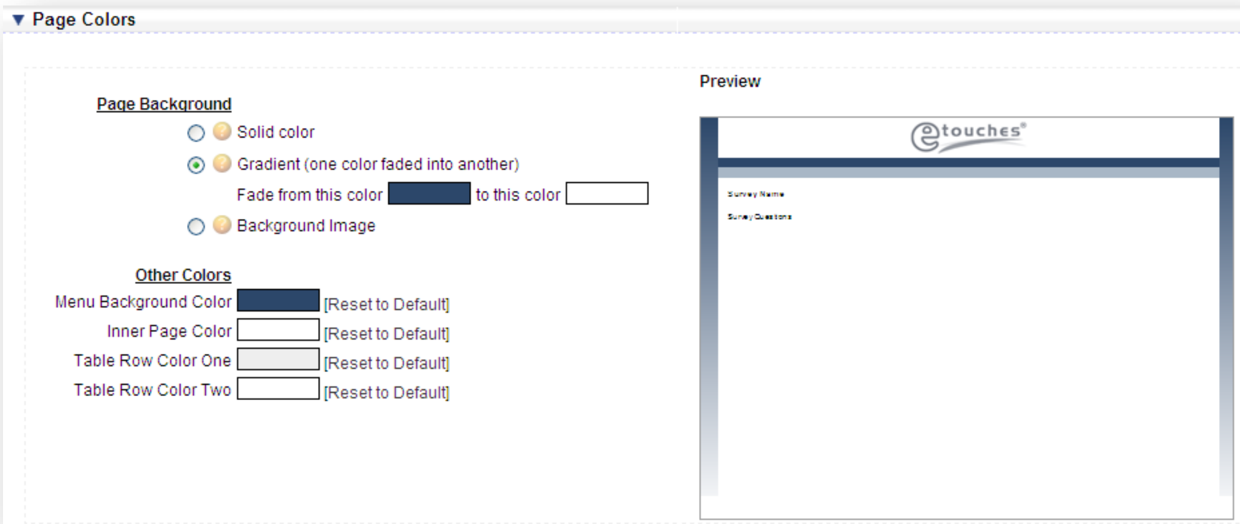
Use eReg Logo for eConnect: Check this box if you want to use the same event logo for eConnect that you use for your eReg site. If this box is unchecked you will be able to browse for another logo on your computer os select one from your account's image database as shown in the screen shot below.



Colors & Fonts: In this section you can either choose to use the look and feel from eReg or edit the background page colors and the font styles of your eConnect. Any changes made will be shown in the preview of your eConnect to the right of the page colors.

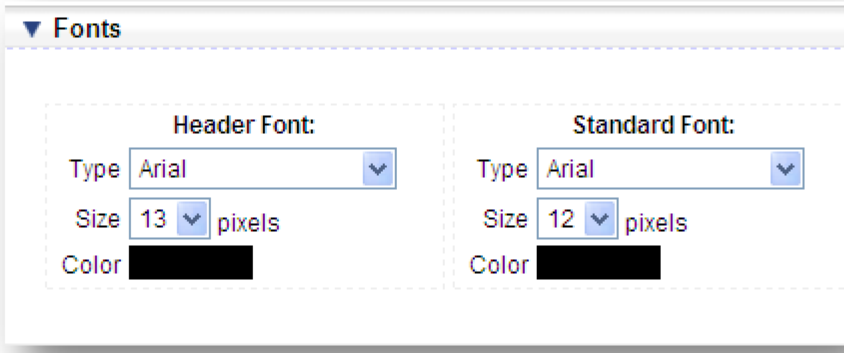


Use eReg Colors and Fonts for eConnect: Check this box if you want to use the same colors and fonts for eConnect that you use for your eReg site. If this box is unchecked you will be able to edit the colors and fonts manually as shown in the screen shot below.



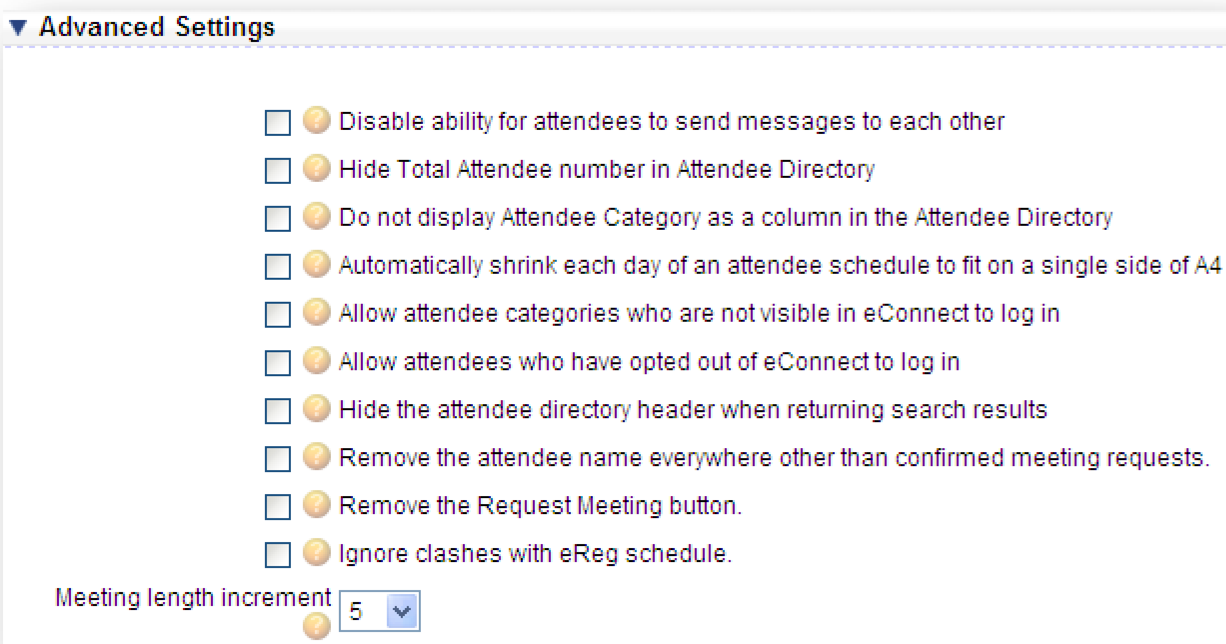
Page Background: Here you can select from one of three options for your page background; either a solid color, gradient, or upload your own background image.

Other Colors: Here you can adjust the menu background colors, and inner page color. Any unwanted changes can be reset to default by clicking the link to the right of the color.



Fonts: Here you can edit the font type, color, and size of both the header and standard font.

General Settings: In this section you can choose to change the advanced settings for your eConnect site.



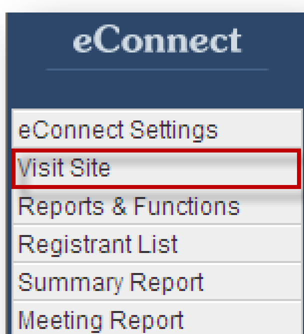
- **Disable ability for attendees to send messages to each other:** This option prevents users from sending messages to each other when logged into eConnect- they can only send meeting requests.
- **Hide Total attendee number in attendee directory:** This hides the total number of attendees; otherwise they number of attendees will be displayed at the top of the directory page.
- **Do not display attendee category as a column in the attendee directory:** This will remove the attendee category column from the attendee directory. This is useful if you want to display the dropdown at the top of the page with the attendee category in it, but do not want the category in a column on the page.
- **Automatically shrink each day of an attendee schedule to fit on a single side of A4:** Checking this will shrink the content of each attendee's schedule so each day fits on a single sheet of A4.
- **Allow attendee categories who are not visible in eConnect to log in:** Checking this will allow attendee categories who are not visible in eConnect to login and view the other attendees in the directory.
- **Allow attendees who have opted out of eConnect to log in:** Checking this will allow attendee who have opted out of participating in eConnect to login and view the other attendees in the directory.
- **Hide the attendee directory header when returned search results:** Checking this will hide your directory header when the page is returned search results. This can be useful if you have a large header that forces people to scroll a long way down the page each time they search.
- **Remove the attendee name everywhere other than confirmed meeting requests:** This option will automatically remove the attendee name from your eConnect site. The only place that it will be visible is on confirmed meeting requests.
- **Remove the request meeting button:** This option will automatically remove the meeting button from your eConnect site. Attendees will only be able to use eConnect to send messages.
- **Ignore clashed with eReg Schedule:** This option will allow attendees to schedule meetings at the same time as sessions booked using eReg. This can be handy if you're using an eReg session to indicate when people are allowed to use eConnect.
- **Meeting length increment:** This sets the increment in minutes for a meeting length.

Language & Wording: In this section you can customize the default system text to display differently.

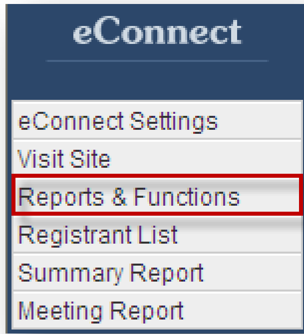
▼ Customize Standard System Text

	Standard Text *(red text has been modified)*	Login	Schedule	Directory	Attendee View	Send Message	Request Meeting	Advanced Search	Pending Requests	Appointment Editor	Cancel Meeting	Actions
Customize	Accepts Checked Meetings								✓			
Customize	Add Appointment		✓									
Customize	Advanced Search		✓					✓				
Customize	Appointment Details									✓		
Customize	Attach a Message						✓					
Customize	Attendee Details				✓							
Customize	Attendee Directory		✓									
Customize	Attendees Per Page		✓									
Customize	Back									✓	✓	
Customize	Cancel						✓					
Customize	Cancel Meeting										✓	
Customize	Cancel this appointment									✓		
Customize	Change Date:		✓									
Customize	Check Availability						✓					

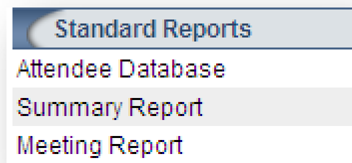
Customize: Click the customize button to change the text. Any text that has been changed will display red. The green checkmarks across the page will display what page that text appears on.



Visit Site: Clicking this option will open your eConnect site in a new window to view. This is the same site that your attendees will access. This feature is useful to view any changes you made or would like to make to your look & feel, as well as setup of eConnect.

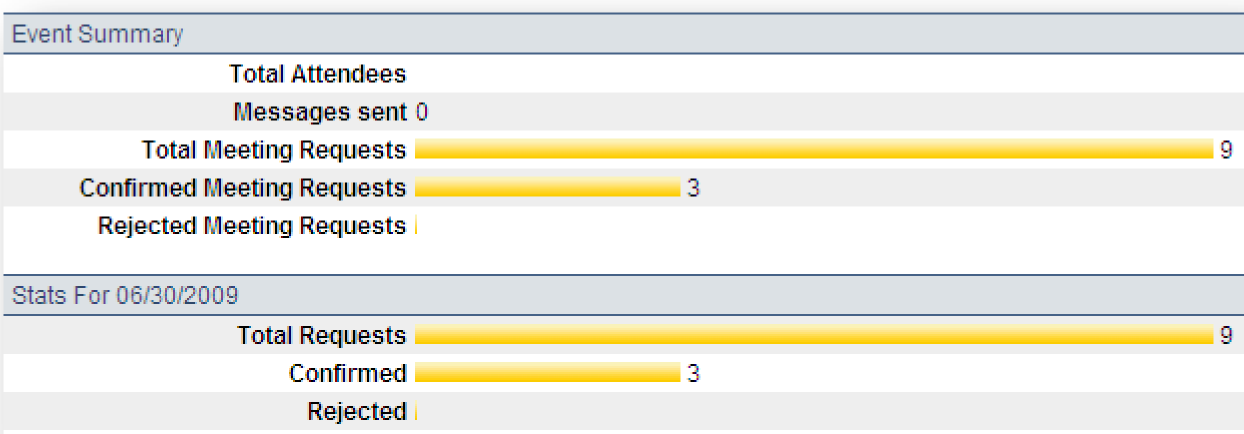


Reports & Functions: Clicking this option will display the standard reports as well as functions available to you within the eConnect module.

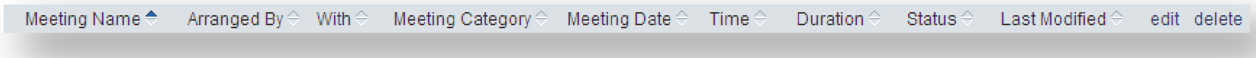


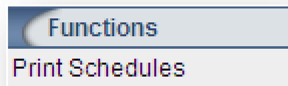
Standard Reports:

Attendee Database: Clicking this link will display every registration in the eConnect attendee database as well as their information.
Summary Report: Clicking this link will open the summary report that displays the event summary and statistics for each of the days in your schedule as shown below.



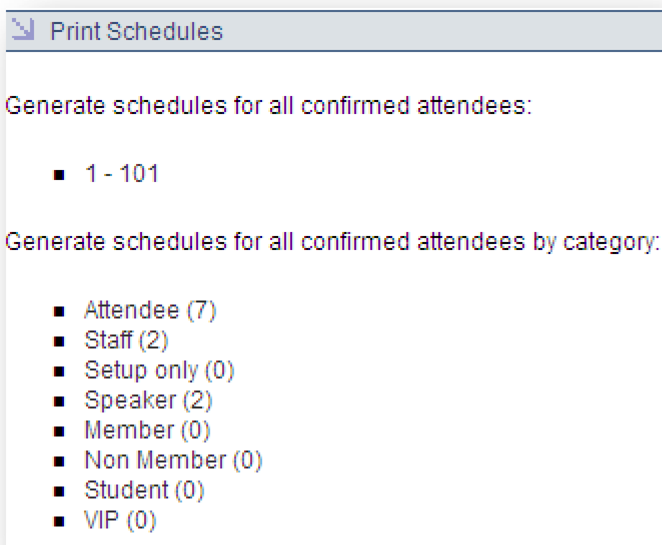
Meeting Report: Clicking this link will open the meeting report as shown below. The meeting report will display all the meetings that have been created as well as who they were arranged by, duration, etc.

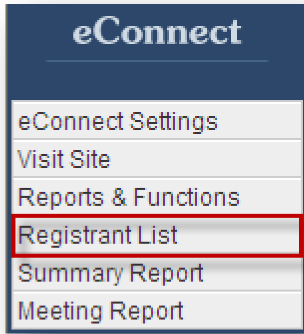




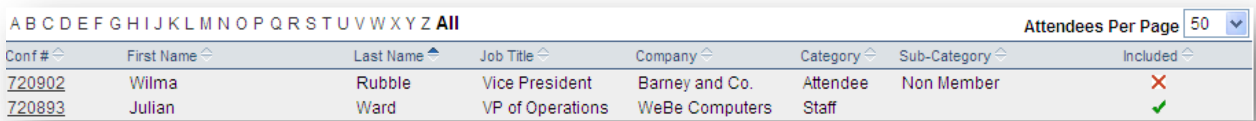
Functions:

Print Schedules: Clicking the print schedules will allow you to view each category and the number of attendees in each category. Click on the name of the category to print the schedule for each attendee. You can also clock the first link which will print all the schedules for the confirmed attendees.

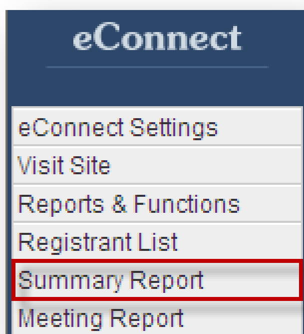




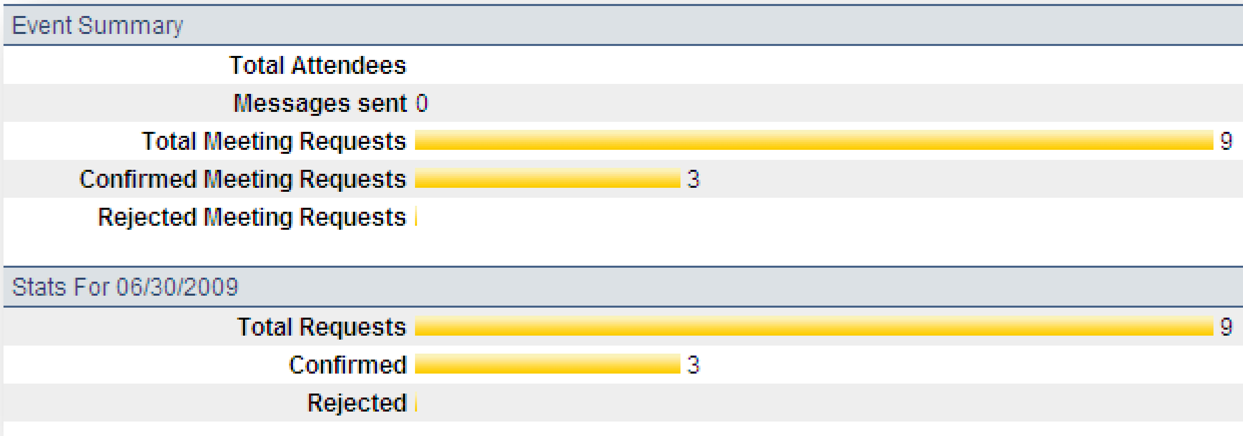
Registrant List: Clicking this option will allow you to view the current registrant list in your eConnect database. This is the same information that is included on the attendee database report.

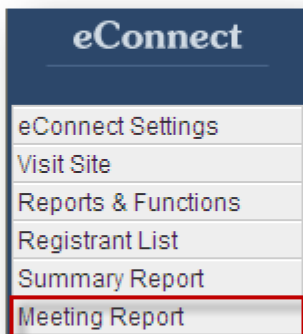

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z **All** Attendees Per Page 50

Conf #	First Name	Last Name	Job Title	Company	Category	Sub-Category	Included
720902	Wilma	Rubble	Vice President	Barney and Co.	Attendee	Non Member	✗
720893	Julian	Ward	VP of Operations	WeBe Computers	Staff		✓



Summary Report: Clicking this link will open the summary report that displays the details regarding your event summary and statistics for each of the days. This is the same information that is included on the summary report in the reports and functions link.





Meeting Report: Clicking this link will allow you to view a report of all the meetings in the eConnect database. This is the same information that is included on the meeting report in the reports & functions link. This report displays every meeting, who arranged it, the duration, etc.