# Exhibitor Badge Registration and Housing Overview

Experient is the badge registration and housing system for EDUCAUSE 2017. The Experient system has continued features this year that give the group contact options for how to manage the group's registration and housing needs:

- Contact manages entire group's badge registration and housing.
- Contact manages group's badge registration and invites individuals to manage their own housing.
- Contact invites individuals to manage their own badge registration and housing.

Whether you choose to manage your entire group's registration or invite individuals to manage their own name badge and/or housing, the main booth contact must first sign into the Experient system and verify contact information. If there are any changes to the group contact information, please e-mail corp@educause.edu

Once logged in, you have a few options on how to manage your group's badge registration and housing. Details are below.

Note: This is not a step-by-step guide but rather a high-level overview of options for managing your group's housing and badge registration needs. If you have additional questions or need a better understanding of each option, please contact Experient at educauseexh@experient-inc.com.

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## Initial Login

- Enter company name and click "Search":



- Select company from search results:
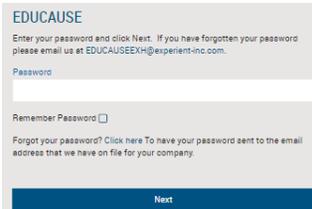
- Enter password:



- Choose how to book hotel rooms:
  - Click "Individual Reservations" if booking nine or fewer rooms or if you don't want a block.
  - Click "Group Room Block" if you want to request a block of rooms (10-room minimum; block *must* be managed by the group contact).



- Verify group contact information is correct. To make a change to contact information, please e-mail corp@educause.edu.
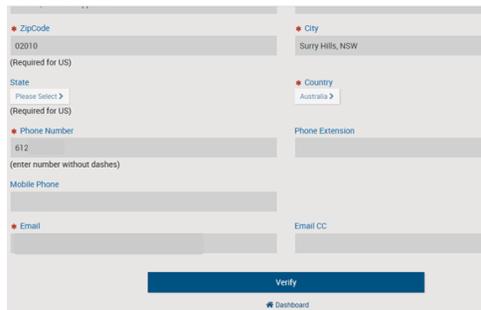


- After verifying the contact information, you will be directed to the group dashboard.

At this point, the main booth contact has three options for managing the group's name badge registration and housing.

| Group Contact Manages Entire Group's Name Badges and Housing | Group Contact Manages Name Badges and Invites Individuals to Manage Own Housing | Group Contact Invites Individuals to Manage Own Name Badges and Housing |
|---|---|---|
| All badge and housing transactions are initiated and managed by the group contact.<br><br>MOST STRAIGHTFORWARD APPROACH | The group contact manages name badges and then sends an invitation to registrants with unique links for booking their own housing.<br><br>Housing transactions completed by individuals will be added to the group summary. | The group contact disseminates a URL to individuals for booking their own badge registration and housing.<br><br>Name badge and housing transactions completed by individuals will be added to the group summary. |
| Click "Manage Group"<br><br><br><br>**Note:** When adding new personnel, all required information, including emergency contact information, must be provided before the record will be saved.<br><br>There are two ways to add personnel:<br>(1) One by one<br>(2) Import en masse using spreadsheet template<br><br>*Manage Entire Group's Name Badges and Housing Continued.* | Click "Manage Group"<br><br><br><br>**Note:** When adding new personnel, all required information, including emergency contact information, must be provided before the record will be saved.<br><br>There are two ways to invite registrants to book their own housing:<br>(1) Initially when adding a new person<br>(2) After a "Registration Only" has been completed<br><br>*Manage Name Badges and Invites Individuals to Manage Own Housing Continued.* | Click "Manage Group"<br><br><br><br><br><br>*Invite Individuals to Manage Own Name Badges and Housing* |
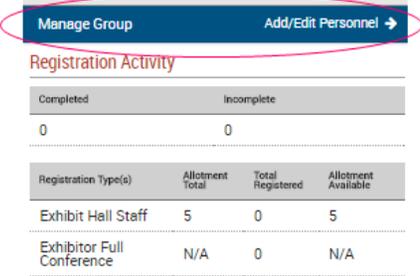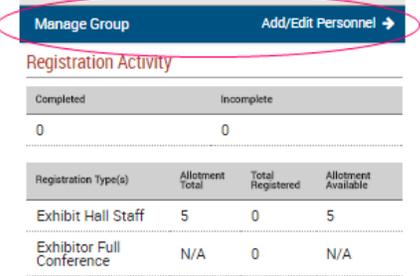
**Add personnel individually (one by one)**



Choose an option:



Note:

- If managing a room block, "Housing Only" and "Registration & Housing" will not display as an option (not shown in above image).
- The "Housing Only" option requires all badge information for the individual except the badge registration type.
- See column two for more information on the "Invite" option.

- Each invited person will be sent an e-mail with a unique link to an individual dashboard for booking their own housing.
- The link in the e-mail can be used to access the individual dashboard at any time to view the participant (attendee) list and modify housing.
- The individual will *not* be able to modify the badge registration completed by the group contact.

**Invite When Initially Adding New Person**



Select the "Invite" option
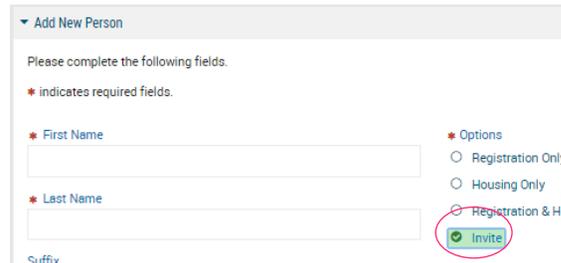


Complete the fields for the name badge registration and click "Add."

Once "Add" is clicked, the individual will be added to your roster and an e-mail will automatically be sent inviting the person to book housing.

**Invite After the Fact**

The URL is specific to your company and can be disseminated to representatives by e-mail blast or on a case-by-case basis.
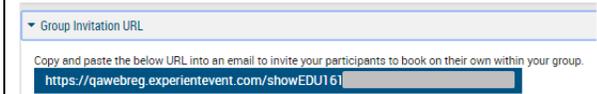


**Here are a few tips to share with individuals who are invited to complete their own name badge and housing from the "Group Invitation URL":**

- Individuals should access the system when they are ready to complete badge registration *and* housing (if needed).
- Credit card payment is required for a purchased name badge; credit card guarantee is required for hotel room.
- It is important that individuals process name badges first so they can set up passwords. The password is the only way individuals will be able access their dashboards at a later date.
- The "Group Invitation URL" should be bookmarked so individuals can easily access their dashboards at a later date (remember that a password will be required).
- If an individual only books a hotel room (does not process badge registration that creates a password), the group contact will have to send the invitation e-mail (see column 2) to the individual in order for him/her to access the dashboard at a later date.

**Add personnel en masse with an Excel spreadsheet template:**

**Group Summary**

- ▸ Add New Person
- ▸ Import Personnel
- ▸ Export Personnel
- ▸ Group Invitation URL
- ▸ Filter

<span style="color:red">Note:</span>
- Pay attention to the required fields in the spreadsheet (most are required).
- Do not change the column order or headers.

**Other "Group Summary" Features**:
- "Export Personnel" to spreadsheet for group status review.
- "Group Invitation URL": See third column— this link allows individuals from your group to manage their own name badge *and* housing.
- "Filter" to view records of added personnel.
- Add lunch tickets to any personnel's record.

If individuals were registered for a name badge only and did not receive an invitation at the time of the badge registration, an invitation can be sent from the group roster on the "Group Summary" summary page.

Select the individuals to receive an invitation and click the "Invite Selected" button. A check mark will appear in the records for individuals who are sent an invitation.

| Registration | Housing | Events | Balance Due? | Invitation |
|---|---|---|---|---|
| Register | + Room | | ☐ ✔ |
| Cancelled | + Room | | ☐ |
| Exhibit Hall Staff ✕ | + Room | Lunch Tickets | ☑ |
| Exhibit Hall Staff ✕ | + Room | Lunch Tickets | ☑ |
| Exhibit Hall Staff ✕ | + Room | Lunch Tickets | ☑ |