# Appointments Quick Guide

This document is a guide to setting up one-to-one appointments in Certain. It covers both Pre-Scheduled and Self-Scheduled Appointments.

For optimal results, be sure to have a basic understanding of the Certain Platform before implementing the Appointments program for your event.

## Table of Contents

## 1.    Preliminary Setup

Before you start configuring Appointments, you need to complete the following:

1. Add the event in Certain.
   - This must include **Attendee Types** for registrants who will be participating in appointments. Whether you are running Pre-Scheduled or Self-Scheduled Appointments,

they are based on the participants' attendee types (for example, Exhibitors and Buyers at a trade show).

- If any attendee types are **Exhibitors** who will be sharing calendars (see "Assigning Calendars" on page 9), then select the check box, **This Attendee Type is an exhibitor and can participate in shared calendars**, on the attendee type record (**Plan > Event Setup > Attendee Types**).
- If registrants are going to be able to **filter** their preferences, you need to set up either or both of these types of custom questions:
  - **Registration** custom questions in the event.
    Plan > Event Setup > Questions
  - **Profile** custom questions in your account (Administrators only).
    Account Settings > Registration > Custom Profile Data

*Note: Questions to be used in filtering preferences **must** be enumerable – answers can be check boxes or radio buttons, but not "free text", for example.*

2. If you are going to use **Appointment Matching**:
   - Set up a registration form (on Plan > Forms), to be completed by all of the registrants who wish to attend. If you wish to use the filtering option in your Appointment Preference Form, include custom questions during the registration process.

## 2. Logging in to the Certain Platform

To access your Certain account you log in to the Certain Platform. Because Certain is a web-based Software-as-a-Service application, you must be connected to the internet in order to do so.

1. Open a web browser and go to [www.certain.com](www.certain.com).
2. In the top right hand corner of the page, click **Customer Login.**
3. Enter your username and password.
   *If you do not have a username, ask an Administrator in your team to create one for you.*
4. Click **Login** to go to your Account Dashboard on the Certain Platform.

Remember that wherever you are in Certain, you can get detailed context-sensitive help by clicking ❓ **Page Help** under ❓▾ **Help and Support** in the global navigation icons at top right.

## 3. Enabling Appointments for the Event

So that you can access the **Appointments** pages in your event, you must first ensure they are enabled for the event.

1. Click the ☰ **Top-Left Menu,** and then click **Events** to go to the Event List.
2. There, select the event in which you will be setting up appointments.
3. In that event, click **Plan** on the Top Navigation Bar, and select **Configure**.
4. That opens the **Event Options** page.
5. Scroll down and select the **Appointments Module** check box.
   If you don't see the check box, then the Appointments Module is not enabled for the account; speak to your account administrator.

6. Selecting the **Appointments Module** check box adds one or more further check boxes, depending on the modules enabled for your account.
You need to select at least one of these two.
    a. **Appointment Matching** – Generate pre-scheduled appointments based on attendees' appointment preferences. Attendees complete a n online form in which they select the other attendees with whom they would prefer to have appointments.
    b. **SSA** – **Self-Scheduled Appointments**. Attendees can request appointments directly with other attendees, and accept/decline requests they receive. If Appointment Matching is also selected, attendees are usually allowed to request SSAs *after* pre-scheduled appointments have been generated. But SSA can be selected *without* Appointment Matching.

    > *Note:* SSA requires the use of **Certain Mobile** or **Event Views**., which attendees use to request, accept and decline appointments.  See the separate guides for those products.

7. The other check boxes you can choose to select, if they are activated for your account, are:
    a. **Appointment Rotations** – Create sets of appointment blocks and activities which can be assigned to registrations. Usually used with Registration Groups. (See separate Groups quick guide.)
    b. **Exhibitor Management**  Create exhibitors and assign shared calendars.
8. Click **Engage** on the top navigation bar. This now includes an **Appointments** option.
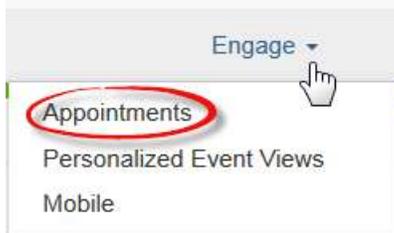
That is where you will set up and manage everything to do with appointments as described below.

## 4.    The Appointments Pages

Click **Engage > Appointments** to go to the **Appointments Overview** page, where the Left Navigation Panel incudes these page links (or just some of them, depending on what is enabled for your account). These are the same whatever Appointments page you are on

- **Overview**
- **Search**
- **Configure**
- **Templates**
- **Pre-Scheduled/AME**
- **Self-Scheduled**
- **Rotations**
- **Calendar Assignment**
- **Reports**
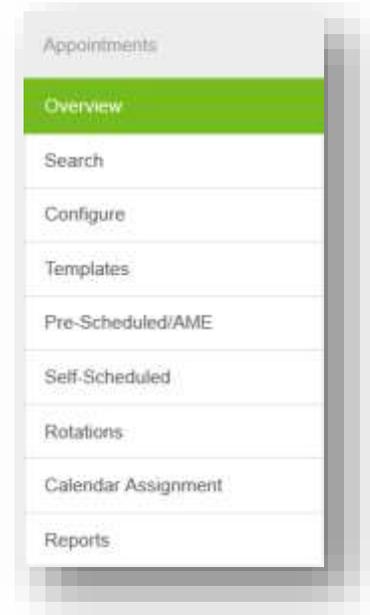
Most of your initial configuration is done on these three pages:

- **Configure** – General Appointment Configuration (see the next section below, page 4).
- **Pre-Scheduled/AME** – Pre-Scheduled Appointments, if Appointment Matching is enabled for the event (see page 6)
- **Self-Scheduled**  – Self-Scheduled Appointments, if SSA is enabled for the event (see page 7)

## 5.    General Appointment Configuration

Go to **Appointments > Configure**.

On this **General Appointments Configuration** page you configure Appointment Management for the event, in these four sections:

1.  **Appointment Settings** – An option to not allow appointments to overlap with event sessions.* If selected, appointments cannot be scheduled during event sessions for which an attendee is registered.          *(*Note:* "Sessions" are Agenda Items, unless Speaker and Session Management is enabled, in which case they are Sessions added in Manage > Session Management.)

> *Warning:* This setting applies *only* to appointments made via the appointment matching engine or SSA. It does not prevent attendees from selecting sessions that may overlap with existing appointments, nor planners manually assigning such sessions.

2.  **Appointment Eligibility** – who can request appointments with whom, based on attendee types.

For each attendee type in the first column that can select preferences (or send SSA requests), select the attendee types in the second column that they can meet with.

In the other columns, for each attendee type select whether they can select preferences, have self-scheduled appointments, block time, and so on. (See the online help for full details.)

3. **Status Eligibility** – optionally, which registration and/or approval statuses define those whom attendees can select as preferences (and to whom they can send SSA requests, if SSA is enabled).

4. **Appointment Filters** – the custom questions that attendees can use in filtering their selections, if the **Attendee can filter when selecting preferences** option is selected on the Pre-Scheduled Appointments page (see page 6).

# 6.     Templates (including Default Template)

Go to **Appointments > Templates**.

On this **Appointment Templates** page, you configure two types of template:

- **Default Template** – The default settings and "master schedule" for appointments.
- **Custom Templates** –Templates that you add here when the Rotations module is in use.

## Default Template

The default template must be configured in every event using appointments, regardless of whether rotations are in use or not, and *before* you can configure any *custom* templates. It is created for you automatically: to edit it, just click  in the **Actions** column for the **Default Template** row.

The default template includes some minimum and maximum numbers of preferences and appointments, and the "master schedule" for appointments.

*Note:* Too few preferences would yield too few appointments coming out of appointment matching; too many preferences would dilute the value of the appointments generated. Consider these implications, and set the appropriate maximum and minimum values. A suitable guideline for the minimum may be to add 10% to your desired numbered of appointments, and for the maximum to add 50%. So, for example, to generate 20 appointments fort each participant, you might choose to set a minimum of 22 preferences and a maximum of 30. (Leave a value blank to set "no limit".)

**Master Schedule**
The schedule is made up of appointment blocks, each starting and ending at set times on a set day; for example, morning and afternoon blocks on each of the three days of an event.

Each appointment block has a set duration for all appointments in it, for example 30 minutes. All appointments therefore start and end at the same times; for example, 9:00, 9:30, 10:00, etc.

To **add** an appointment block, click **Add Block**, and enter the following information.

- **Name**:        A descriptive name for this time block, for example "Wednesday Morning"
- **Start**:        The date that appointments in this block take place
- **From**:        The time that the first appointments in this block start
- **To:**        The time that the last appointments in this block end
- **Duration:**    The length of time (in minutes) of each appointment slot in this block

- **Travel Time:**   The number of minutes allotted for traveling between appointments

Note that the total of the Duration and Travel Time must divide evenly into the total time in the block. For example, creating an appointment block from 9 am to 12 pm, with appointment duration of 45 minutes and travel time of 15 minutes, will create 3 appointment slots available for the Appointment Matching Engine to fill.

You can leave meal breaks available by not having appointment blocks at those times.

To **edit** an appointment block you have already configured, click that block. To **delete** one, click the delete button in its corner.

The **default template** is used as follows:

1. All settings and all appointment blocks when the Rotations sub-module is *not* in use for an event.
2. As the master-schedule of appointment blocks for custom templates when the Rotations sub-module *is* in use.
3. As a template that can be assigned to a rotation just as a custom template can, when the Rotations sub-module is in use.

## Custom Templates

A custom template can be assigned to a Rotation (on Appointments > Rotations - see page 8). It is then assigned to an attendee when that rotation is assigned to them.

Each custom template is based on the Default Template, with these potential differences:

1. Its appointment blocks are a **sub-set** of those in the default template; you can deactivate (by just clicking) any appointment blocks that you choose to not have available for appointments in a template, but you cannot add or edit any.
2. Any of the other values, such as numbers of appointments or preferences, can be edited.

# 7.    Pre-Scheduled Appointments Configuration

If Appointment Matching is selected for the event, go to **Appointments > Pre-Scheduled/AME**. On this **Pre-Scheduled Appointment** page you set some options concerning attendees selecting their appointment preferences.

We'll be returning to the same page to run the Appointment Matching Engine later; see page 12.

If there is a large number of registrants with whom appointments could be scheduled, then you might enable "Preference Search" and "Preference Filtering" for the appointment preferences form. This makes it easier for your event attendees to navigate through the appointment preference form to find their ideal preferences.

- **Attendee can search when selecting preferences**. Select this check box if in the preferences form participants may search for those with whom they would like appointments. (Without a search, they would have to pick from a list, which in a large event may be too long to use easily.)

- **Attendee can filter when selecting preferences**. Select this check box if in the preferences form participants may apply filters when searching for those with whom they wish to have an appointment. (This is useful if the list of "target" registrants returned by a search is likely to be long.) The questions used as filters are selected on Appointments > Configure (see page 4).
- **Attendee can exclude registrations when selecting preferences**. Select this check box to allow attendees to specify any other participants with whom they definitely do *not* want appointments. They do this in the preferences form. (If this option is set, you may want to set the limit in Appointments > Configure: "Attendee may not exclude more than this many registrations.")

# 8.    Self-Scheduled Appointments Configuration

If SSA is enabled for the event, go to **Appointments > Self-Scheduled**.

On this **Self-Scheduled Appointment Settings** page you configure the settings for Self-Scheduled Appointments (SSAs), so that attendees can request SSAs directly with each other.

(*An Historical note:* In releases prior to Certain 5, these settings were managed on the same page as those for matched appointments.)

**Blocking of Time** – Set the Start and End Date/Time for the period during which attendees can block their own time as being unavailable for appointments, if that is allowed for selected attendee types (as configured under **Appointment Eligibility** on **Appointments > Configure** – see page 4).

**Self-Scheduled Appointments** – Set the Start and End Date/Time for the period during which attendees can send SSA requests.

Optionally, set the maximum numbers of SSAs per day, per event, and with the same attendee. Leave them blank to set no limits.

If you select **Show attendees with Mutual Availability only**, the list of attendees to whom the logged in attendee can send SSA requests is restricted to those with whom they have at least one matching available time slot.

Set **Auto-expire requests that have not been responded to within __** to 12, 24, 48 or 72 hours. If an SSA request has not been accepted or declined within that time, its status is set to Expired. In the **Expiration Note**, enter the text to be displayed when an attendee hovers their mouse over the Expired status of an SSA request in an Event View.

If **Attendee cannot submit or accept/decline appointment requests** is selected, then when attendees access their calendar on Certain Mobile or an event view, they cannot send new SSA requests, or accept or decline SSA requests they have received. (They can still see their calendar, and block/unblock time and delete existing Self-Scheduled Appointments.)

**Apply Default Template for SSA for all attendees**   If selected, the Appointment Default Template set up on the Templates page (see page 5) is used for Self-Scheduled Appointments for all attendees. If it is not selected, then if an attendee has a custom appointment template assigned to them via a rotation, that is used for their SSAs.

The SSA Settings end with a table in which you can set emails to be sent to the recipients of SSA requests. There are two rows, one for each of the two possible Email Frequency settings: DAILY DIGEST and IMMEDIATE.

DAILY DIGEST = a daily email listing all the attendee's SSA requests received since the previous day's digest was sent. (No email is sent if no SSA requests were received that day.)

IMMEDIATE = an email sent as soon as the attendee receives an SSA request.

Select the **Attendee types to whom this applies** for either or both the email frequencies, and **Select Email Template** (from those set up on **Communication > Email Templates**).

**Select Fields for "More" on Self-Scheduled Appointments**

In this section, you choose the profile fields (and profile custom questions) that will be shown to an attendee when they click **More** for someone on an "Attendee Portal" Event View (when selecting their preferences).

For each field, you can edit the label, and the attendee types for which the field will be displayed when **More** is clicked for them. Note: if no fields are selected for an attendee type, then a default set of fields is displayed for such attendees when **More** is clicked: **First Name**, **Last Name** and **Organization**.

**Self-Scheduled Appointment Matching**

To automatically change pending SSA requests to being *Accepted*, as if the "target" attendees had accepted them themselves, select the attendee types whose requests are to be marked as accepted and click **Accept All Pending Requests**.

# 9.    Rotations

If the Rotations sub-module is enabled for the event, you go to **Appointments > Rotations** to add (or edit) rotations. Rotations are sometimes known as a "waves", but are always referred to as "rotations" in Certain.

A rotation, which can be assigned to one or more groups (and thus to the registrants belonging to that group), and directly to registrants, can define both the appointment template to which a registrant is assigned, and agenda items assigned to them automatically.

Before adding rotations, you would therefore normally want to add the appointment templates (see page 5) and agenda items that you will add to the rotations.

Give each rotation a unique **Rotation Name**, and specify its **Start Date** and **End Date**.

**Appointment Template** - Select one appointment template (as set up on Appointments > Templates, see page 5). This defines the appointment blocks in which registrants in this group can have appointments generated by the Appointment Matching Engine.

**Agenda Items** - Optionally, select any number of agenda items to assign to this rotation. These will be automatically assigned to registrants on this rotation.

## 10. Assigning Calendars

If the **Exhibitor Management** sub-module of the **Appointments Module** is enabled for the event, go to **Appointments > Calendar Assignment**.

This **Calendar Assignment** page is expected to be used when Exhibitor Event Views are in use. For each exhibitor that has multiple calendars available to them, you can assign those calendars to the exhibitor and to their partners. Think of this as distributing the total number they have available.

An "exhibitor" is a registrant whose attendee type is one with the check box selected (under Plan > Event Setup > Attendee Types > Exhibitor Management) for **This Attendee Type is an exhibitor and can participate in shared calendars**.

Click an exhibitor in the list to see a summary of their inventory of calendars: the **Total Calendars** available to them, the number of calendars **Assigned** to them and their partners, and the number **Remaining**.

That summary is followed by a table with a row for "*Self*" (i.e. the exhibitor) and one for each of the exhibitor's partners. The table has three columns:

- **Assign to** - "Self" (i.e., the exhibitor) or a partner's name.
- **Assigned Calendars** - The number assigned to this person.
- **Actions** - Click ⊞ to assign a calendar, ⊟ to "unassign" one, or 📅 to view the person's appointment calendar.

## 11. Importing Locations (for Pre-Scheduled Appointments)

An appointment is always between two attendees, and takes place at a location specific to one of them. In the case of an exhibition, for example, where appointments are between exhibitors and buyers, that location would normally be the exhibitor's booth. The name of a location is held on the attendee's registration record, which for an exhibitor would be their booth number. Although you can enter the location for an attendee directly on their registration record (where it is shown with their Availability Information, described on page 10), the standard way to assign locations is by importing them as part of a registration import. That import could be of new registrations, but is more likely to be importing data to update existing registrations, which is the process explained here.

1. Prepare an import file, by exporting the relevant attendees from Certain to a tab-delimited text file.
   a. Go to **Reports/Analyze**, and create a *Registration*-type report that includes the attendees you want to update (for example, all exhibitors).
   b. Include the **Profile Unique ID** as the first column (because that will uniquely identify the attendees when you import the file back into Certain).
   c. Include the **Primary Location** column (because that's the one you want to be updating), and the **First Name**, **Last Name**, and **Organization** columns (to ensure that you can identify the right attendees when you edit their locations).
   d. Export that file to Excel.
2. Edit that file in Excel to add the locations.

a. Remove the header rows (if any), apart from the data column headers themselves, and also the "row #" column (if any).
b. Edit the **Primary Location** column for each attendee who should have one. This is "free text", so will not be validated – enter it the way you want it to appear on attendees' appointment schedules.
c. Save the file as a tab-delimited text file. The filename must end with a .TXT suffix.
d. Close the file.
3. Import that file back into Certain to update those attendees' records with locations.
a. You must be an Administrator to perform a data import in Certain.
b. Go to **Event Dashboard > Import**
c. Select **Import/Update Registrations** as the type of data to import, and step through the **Registration Import Wizard** to import the file.
4. Run a report to check that everyone who needs a location now has one.
a. Go to **Reports/Analyze**, and create a report that includes **Primary Location**.
b. Run the report for all the relevant attendees (for example, Exhibitors).
c. If any of those attendees do not have a Location, you can enter one for them by editing their Preferences, as described below.
d. If there are several without Locations, you could always just edit the import file to add them, and then re-import the edited file.

## 12. Attendee Availability

If you go to an attendee's Attendee profile page (by going to **Manage > Registrations** and clicking **Find**, for example), you will see an **Availability Information** section. This can show **Available From** and **Available Until** dates and times for the attendee.

These are set automatically based on the attendee's flight arrival and departure times (in the **Travel Packages** module), plus/minus the maximum transfer time set on **Travel > Configure**.

If you select **Enable manual override of Availability dates**, you can edit these availability dates/times, for attendees who will be arriving late and/or leaving early, for example. Otherwise, they are "read only" information.

The Appointment Matching Engine (see page 12) takes an attendee's availability restrictions, if any, into account when generating appointments.

## 13. Creating a Form for Collecting Appointment Preferences

1. Go to **Plan > Forms**.
2. Create a new form. Call it "Appointment Preferences", or something similarly intuitive.
3. *Important:* Set the **Open** date to be *after* event registration closes. This is to ensure that all attendees will have completed their event registrations before anyone can start selecting their appointment preferences.
4. Configure the Form:
a. On the **Forms > Setup** page, add the **appointments** section to the current form in the **Page Layout** selection box.

*Note: We recommend placing the **appointments** section after the **attendee type** section, and removing any section not needed by the appointment preference form, such as the **payments** section. Best practice is to include the **entry**, **registrant details**, **appointments** and **confirm** sections.*

b.  On the **Forms->Entry** page:
    - Change **Form Entry Permissions** to "**Restrict to registrations in this event**". This ensures that only individuals who have registered for the event are allowed to log in to the Appointment Preferences form and make preference selections.
    - Set **Username and Password collection** to "*Required*", and select appropriate **Username** and **Password** credentials.
    - Under **Select statuses to allow for entry**, click **Select All**. This enables registrants to log in to make their selections, regardless of their status.

c.  On the **Forms > Registrant Details** page (which *must* be included on all forms):

    Best Practice recommendation is to include **First Name** and **Last Name** as both "Required" and "Read Only". That way the registrant can (and must) enter a value if either field is blank, but can't change them if they do have values. Both fields are required for the Appointment Matching Engine.

    If you actually want registrants to confirm/edit their details, do so by including any other fields, and perhaps not making First Name and Last Name "Read Only".

d.  On the **Forms > Appointment** page, you can customize the instructions on the appointment preference selection page. For example, "Please select your appointment  preferences."

e.  In addition, if the **Provide instructions for appointment preferences minimums / maximums** check box is selected, as it is by default, then the Appointment Preferences form will include instructions for the attendee, quoting the limits to the numbers of preferences that you set in **Appointments > Configure**.

f.  And if the **Show Attendees who selected me as an appointment preference** check box is selected, then a check box with the same label will appear on the form. If the attendee selects that check box, then the only attendees listed for them to select from as preferences will be those who have selected them as one of their own preferences.

g.  Under **Select Fields**, you can select specific profile fields and custom questions to be displayed as part of a registrant's profile when an attendee clicks the **More** link after a name on their list of potential preferences. This can help your attendees identify people they would be most interested in meeting with.
    *(Note: The **More** link is not shown on the form if no fields are selected here.)*

    Click on the fields you want in the **Available Fields** column; this adds them to the **Fields to Display** box on the right. You can re-order fields dragging them, and can edit their labels.

h.  On the **Forms > Confirm** page you can configure the confirmation page. For an appointment preferences form, we recommend clearing the header names for all sections except **Appointment Preferences**, so that the latter is the only section displayed.

## How Registrants Will Use the Form

Here's how a registrant will be able to select their preferences on the form. This is described in much more detail in the online help topic for **Appointment Preferences (Attendee Form)**.

The names of registrants (with their organization names) will be listed, with a check box next to each one. Selecting a check box will add that person to the end of the registrant's list of **My Preferences** on the right, where they can drag and drop names to prioritize the list.

The registrant can limit the names displayed for them to choose from by any of the following: selecting an Attendee Type, selecting organizations from the Attending Organizations list, searching by name, or filtering (based on the custom questions you made available).

Detailed profile information on each registrant can be found by clicking that person's **More** link. That opens a dialog that contains a profile of the registrant, including all the fields you configured on the **Form > Appointment** page.

## 14.    Verifying and Editing Appointment Preferences

As a planner, you have access to the registrants' preferences and appointment calendars. To edit any preferences before running the Appointment Matching Engine, go to **Appointments > Search**.

Search for the registrant concerned, and click ⚙ to edit their preferences.

*Note: In addition to reviewing an attendee's preferences and exclusions, you can also add additional ones for them, or remove existing ones.*

## 15.    Running the Appointment Matching Engine

If Appointment Matching is enabled for your event, then once your attendees have all entered their appointment preferences (and you have reviewed/edited them as necessary), you can run the Appointment Matching Engine to create appointments based on those preferences.

Go to **Appointments > Pre-Scheduled / AME**. (This is the same page that you used to set up some pre-scheduled appointment settings earlier – see page 6.)

Review the steps listed on the Appointment Matching page to ensure everything is ready. These include having configured all the appointment settings, and having run a Locations report, as described above.

Click the **START AMe** button.

*The time the appointment matching engine takes to run will depend upon the number of participants and preferences, and the master schedule into which the appointments must fit.*

You will be notified by email when the process is complete. You can then review/edit the appointments if required, and deliver appointment schedules to attendees, as described in the next two sections

## 16.    Reviewing and Editing Appointments

Once appointment matching is complete, you can review and edit any attendee's appointments.

1. For a guide to attendees' availability, you can run a report listing everyone's appointments, showing who has free slots, and when. Go to the **Appointments > Report** page, and click **Attendee Appointments Report**. (See page 15.)
2. To edit or add appointments, go to **Appointments > Search**, and find the attendee you're interested in, as you did when editing preferences (page 12).
3. Click the Calendar icon 🗓 to **View** the participant's **Appointment Calendar**.
4. To edit an appointment, just click an existing appointment to display its details, which you are free to edit.
5. To add a new appointment, either click an available time slot on the appointment calendar, or click the **Add Appointment** button above the calendar.
6. Whether you're adding or editing an appointment, just select or enter the details in each required field.
7. To delete an appointment, edit it and click **Delete**.
8. **If a registrant cancels during an event**, you can set their status to "*Cancelled*" to remove their appointments and appointment preferences. If desired, you can then run appointment matching again to fill in the appointment slots opened by the cancellation. If you have any custom statuses for your event (set in **Plan > Configure > Custom Statuses**), remember that only registrants with an "**Accepted**" or "**Pending**" status type are eligible for appointment matching.
9. **You can replace one attendee's calendar with another attendee's appointments**, on the appointment calendar page *before* cancelling an attendee. Under the individual's appointment schedule, scroll down to the **Transfer Appointments** section. Find the attendee you would like to assign those appointments (and preferences) to, and click the **Transfer** icon 📲 in the **Actions** column.

## 17.   Providing Attendees their Appointment Schedules

You can provide your attendees their appointment schedules via email, Certain Mobile, or paper printout.

### Sending Appointment Schedules via Email

To **email** your attendees their appointment schedules, follow these four steps:

1. Configure the Itinerary settings
2. Create an appropriate email template
3. Create (or edit) a Registrations report
4. Run that report and select Compose Email

**1. Configure the Itinerary settings**

Go to **Communication > Itinerary**. Select **Include Appointments**, choose whether to **Display Travel Time** (between appointments , and whether to  **Show Free Appointment Slots**.

**2. Configure an email template**

Go to **Promote > Communication > Email Templates**, and either create a new email template or use an existing template for sending out appointment schedules.

To include appointment schedules, you can do either or both of two things:

**2a.** Select Appointment Schedule as an item to Append to the body of the email message, at your preferred location.

The email will not only include details of all the attendee's appointments in the body of the email, but will also have an ICS calendar file attached to it. The attendee can import that file into many calendar programs, such as Microsoft Outlook, Google Calendar, or Apple iCal.

**2b.** Select **Attach Itinerary PDF**, and its sub-option **Include Appointments**.

The email will have a PDF attachment showing the attendee's itinerary including their appointments, as configured in step 1.

**3. Create Registrations Report**

Go to **Reports/Analyze** and create a new *Registrations*-type report (or configure an existing one).

To generate a report including only attendees who are participating in appointments, go to the **Filters** page, and in the **Standard Registration Filters** section, select *Yes* for the **Appointment Participants Only** filter.

**4. Run Report and Compose Email**

Still in the Report List (i.e. Reports/Analyze), run the report configured in Step 3. It lists everyone allowed to participate in appointments.

As with any other standard Registrations report, you can email all of these attendees, or just a subset. Select the ones you want to email, click **Actions** in the "Action bar", and select **Compose Email**. Select the Email Template you configured in Step 2, make any changes required, and click **Send Email NOW**.

## Displaying Appointment Schedules via Certain Mobile

In **Certain Mobile**, appointments are automatically integrated into an attendee's **My Calendar**. Once an attendee logs into their My Calendar page, as well as seeing the sessions for which they registered, they also see all the appointments that have been scheduled for them.

If SSA is enabled for the event, then they can also send, and accept or decline, self-scheduled appointment requests, if you have selected the option allowing them to do so in Certain Mobile (on **Engagement > Mobile > My Calendar**).

## Printing Out Appointment Schedules

To **print** out attendees' appointment schedules you can generate itineraries as PDFs which you can then print.

1. Go to **Promote > Communication > Itinerary** to configure the Itinerary Settings, as described above for email (page 13).
2. Go to **Reports/Analyze** and select attendees using the same process as described above for email (page 14).
3. Click **Actions** in the "Action Bar", and select **Print Itinerary**. This generates a zip file with each selected attendee's itinerary in a separate .pdf file, which you can print from Adobe Reader.

## 18.  Reporting

To print appointment reports, go to **Appointments > Reports**, and run any of the reports listed below.

Most of these are Excel exports, which you can format and print as required.

- **Attendee Appointments Report** - A guide to attendees' availability, listing everyone's appointments, as mentioned on page 12. One Excel workbook, with one worksheet per day, each with one row per participant.
- **Appointment Statistics Report** - Statistics about participants' appointments.
- **Appointment Ratings Report** - Details of each participant's ratings of their appointments.
- **Appointment Preferences Report** - Details of each participant's preferences.
- **Conflict Report** - A list of attendees with Appointments that conflict with Agenda Items or Flights.
  (*Note:* if you are using Speaker and Session Management, and have therefore set up sessions instead of agenda items, you can add a custom report of type **Conflict Report** under **Session Data Reports** by going to **Reports/Analyze** and clicking **Add Report**.)
- **Event Appointment Statistics Report** - Overall numbers of preferences and appointments per eligible attendee type.
- **Appointment Preferences Statistics Report** - Statistics about participants' preferences, analyzing numbers of preferences and resulting appointments.