

Section 1: Getting Started

This manual provides the general information and the instructions you'll need to use the many features of CME Web Tracker™. A working knowledge of Microsoft Windows®, Microsoft Excel® and Microsoft Word® are assumed.

CME Web TRACKER Staff Edition™ System Requirements

Before you access the CME Web TRACKER™ software, your PC must meet the following system requirements:

Operating System: Windows NT®, Windows 2000®, Windows XP®
Printer: A properly connected printer supported by Microsoft Windows® is highly recommended.
Microsoft Internet Explorer 6.x
Adobe Acrobat Reader®
Microsoft Word®
Microsoft Excel®

Technical Support

Call Technical Support at 214-943-4942.
Email Technical Support at: Support@cmetracker.com
Web Page address is <http://www.cmetracker.com>

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Section 1: Getting Started

Setup for CME WEB TRACKER Staff Edition™

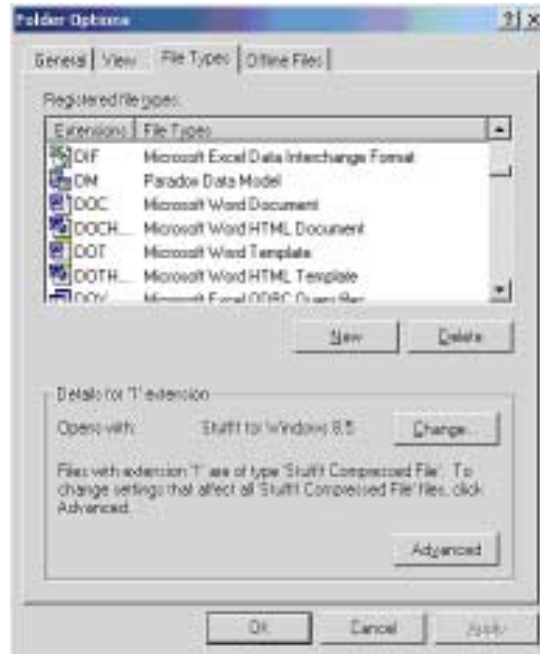
▶ System Configuration



Setup Reports:

Reports are delivered in one of 3 ways: Acrobat Reader, Microsoft Excel® Documents, Microsoft Word® merge documents. The following system change is preferred for accessing both Microsoft Word® documents and Microsoft Excel® Documents:

Access the "Folder Options"... "File Types" Tab on the workstation.
Click the Advanced Button.



Section 1: Getting Started

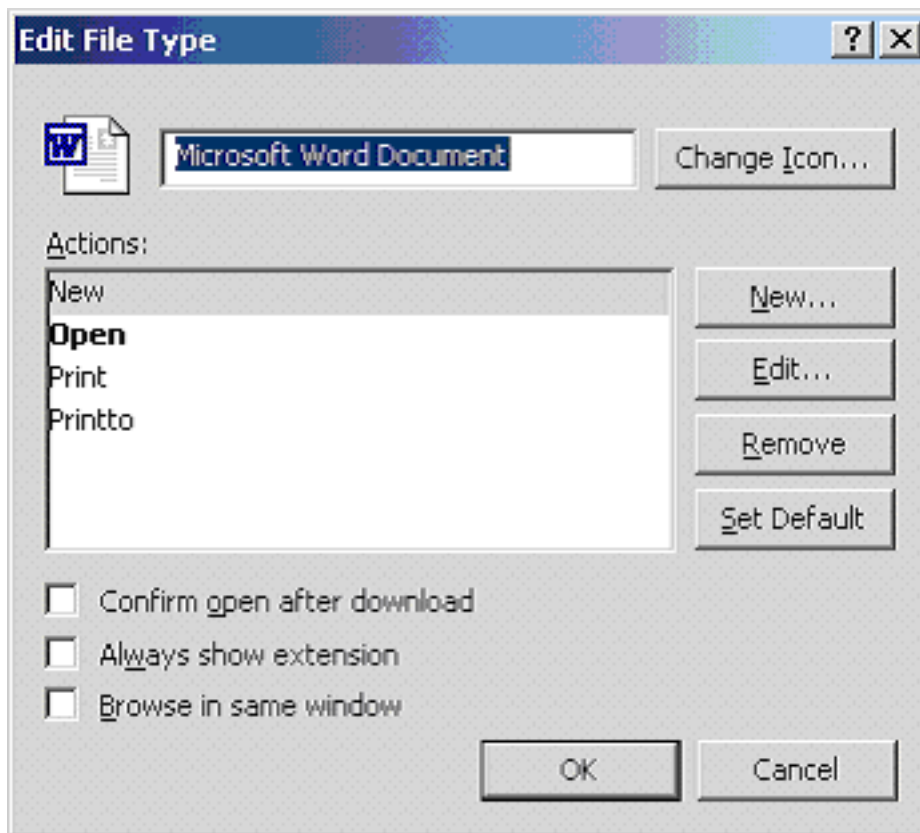
Setup for CME WEB TRACKER Staff Edition™

▶ System Configuration



Set up Reports (cont.)

In the Edit File Type dialog, UNCHECK "Browse in same window".
Click OK.



Create a folder "My Documents" on workstation in the root directory.

Section 1: Getting Started

Setup for CME WEB TRACKER Staff Edition™

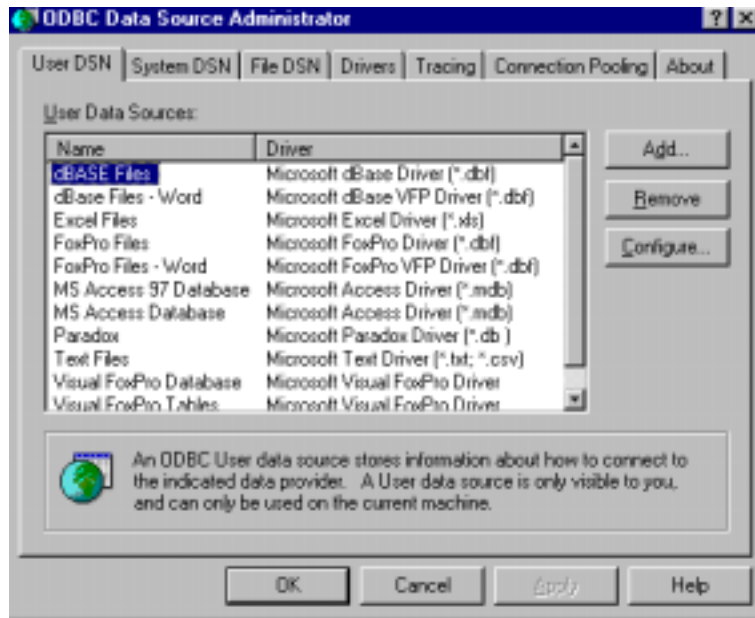
▶ System Configuration



ODBC Drivers for Custom Reports

CME Tracker custom reports use Microsoft Word merge files. The data file for the merge is a Dbase (.dbf) file. If you have any problem running custom reports, or if the user does not have the data conversion files loaded for Dbase:

Go to Start...Settings...Control Panel...ODBC Data Sources



Click ADD, Select Microsoft Dbase driver and click FINISH.



Database Filename should be DBASE FILES, DESCRIPTION should be DBASE FILES...Click OK.

This should give user access to Dbase merge data in Microsoft Word.

Section 1: Getting Started

Using the CME WEB TRACKER Staff Edition™ Tools

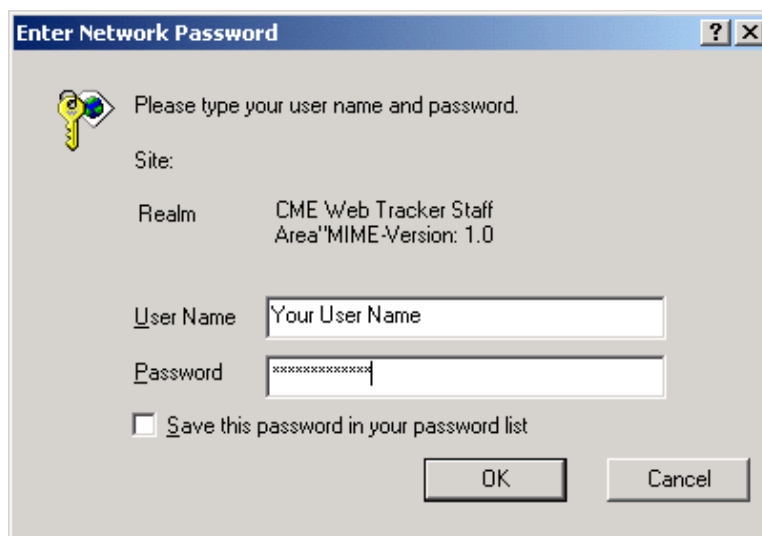
▶ Logon Screen

When you access the CME Web Tracker Staff Edition in your Internet Explorer, you will arrive at the logon screen.

Click the People, Events or Register graphics to access the area of your choice.



Next you will be prompted for a User Name and Password. Type in the User Name and Password that have been provided to you. Click OK.



Section 1: Getting Started

Using the CME WEB TRACKER Staff Edition™ Tools

► **Screen Layout**

Your CME Web Tracker Staff Edition is accessed in your browser. The window may vary depending on your operating system. However, the contents of the window will be the same from any computer. A graphic will "light up" when you position your mouse over it. Your cursor will become a hand-shape when you can click to access a different area.

Sample "People" screen:

The screenshot shows the 'People' screen in the CME WEB TRACKER Staff Edition. The interface includes a header with the logo and navigation tabs: 'Home', 'People', 'Events', and 'Register'. Below the header, there are tabs for 'Personnel', 'Speaker', 'Credits', 'Registered', 'Library', and 'Reports'. The main content area displays a list of items, with one item highlighted in green. Below the list is a detailed form for editing a person's record, including fields for CME ID, First Name, Last Name, Title, Gender, Specialty, and various contact and identification numbers. Annotations with red lines point to specific features: 'Click any tab to move to that screen' points to the top navigation tabs; 'Active Person' points to the 'Personnel' tab; 'Click to Enter EVENTS Area' points to the 'Events' tab; 'Click to Enter Register Area' points to the 'Register' tab; 'Click to ADD' and 'Click to DELETE' point to icons in the top right; 'Click to access your published pages' points to a button; 'Click to go back' points to a button; 'TAB BAR displays info about the record you are viewing' points to the top of the form; 'Click to access pop up list' points to a dropdown arrow; 'List of items' points to the list of records; 'Highlight item and click to delete from list' points to a red 'X' icon; and 'Double click to Name User Defined Fields' points to the 'User Defined A' field.

Section 1: Getting Started

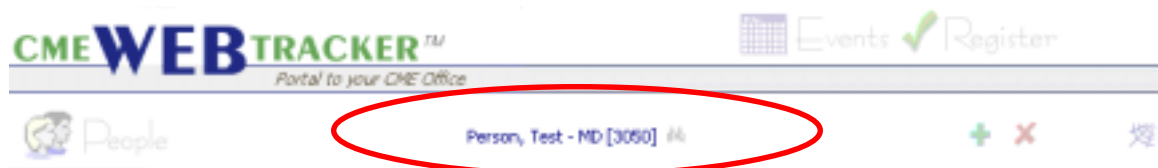
Using the CME WEB TRACKER Staff Edition™ Tools


► Navigation & Selection

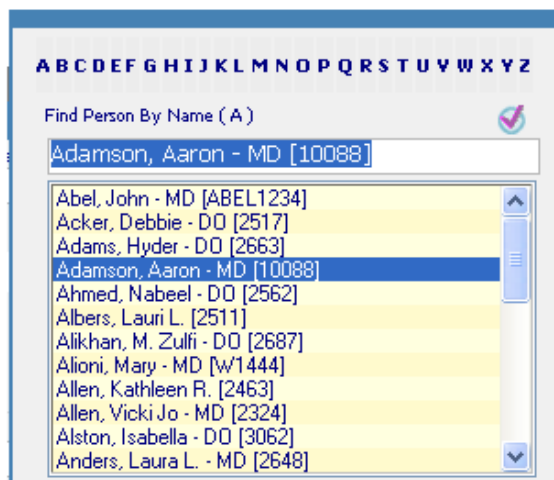


Active Person/Select Person

On the screens where you can select a new person, there is an ACTIVE PERSON displayed. As you move from tab to tab, this person is "active".




To select a new person, Click the binoculars  and begin typing, last name first... continue typing the name until you locate the person you are seeking. The new person will be highlighted. Press ENTER to select.



The person you selected will now become the new ACTIVE PERSON.

 When you arrive in a Listing, the active person or event will be highlighted.

 To speed search a particular name: Press "Alt + first letter of last name" will move to the first person who's last name begins with that letter in the list.

Section 1: Getting Started

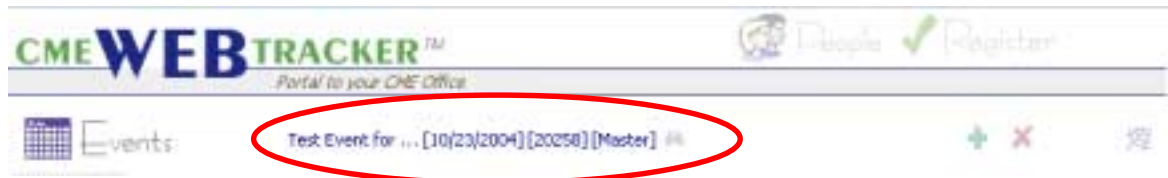
Using the CME WEB TRACKER Staff Edition™ Tools


► Navigation & Selection



Active Event/Select Event

On the screens where you can select a new event, there is an ACTIVE EVENT displayed near the top of the screen. As you move from tab to tab, this event is "active".



To select a new event, Click on the binoculars  and begin typing an event name. The new event will be highlighted. Press ENTER to select.



The EVENT you selected will now become the new ACTIVE EVENT.



Revise your search for an event to search by ID or by NAME. Click the radio button to select ID or Name before beginning your search. Your last selection will remain the default.

Section 1: Getting Started

Using the CME WEB TRACKER Staff Edition™ Tools

▶ **Navigation, Information, Adding, Deleting, Export & Selection**



Add a Record

On the screens where you can add a record, there is a green + icon displayed in the upper right hand area. Click the icon



to create a new, blank record. Once you have a new record, you can proceed to fill in all appropriate fields.



Delete a Record

On the screens where you can delete a record, there is a red X icon displayed in the upper right hand area. Click the icon



to delete the active record. In a list, the active record is highlighted in green. Once the record is deleted, you will be moved to the next record in the database.



Create a Spreadsheet

On the listing tabs you have the opportunity to export the records to an Excel spreadsheet. Click the icon



to export the records and view the spreadsheet. If a filter is applied, the filtered records will be exported.



View your Published Pages

The CME Web Tracker data can be published to pages that may be viewed by a broader audience of your clients. If you are publishing your Calendar of Events or Transcript Generator, Click the web icon



in the upper right hand hand area of your screen to view the published pages.



Tab Bar

The blue tab bar under the tab-set for each area is your source for information about the records within the database. Each tab displays appropriate information based on your location in the WEBTRACKER.

36 Registered

8 Credited

\$12050.00 Revenue

\$2477.00 Expense


Section 1: Getting Started

Using the CME WEB TRACKER Staff Edition™ Tools

▶ Navigation, Information, Adding, Deleting, Export & Selection




Return to Previous Screen

On the upper right hand side of each tab bar, you will find an icon to return to the previous screen. Click the icon  to return to the previous screen.



Go Buttons

Many of the listing screens contain "Go" icons. Click the icon  to move to the area specified in the column header. The highlighted person or event will become "active" when moving with a "Go" icon.



Page Navigation

Each listing screen contains a page navigator to move between the pages. The box under Page # displays the current page, Click the arrow icons



to navigate from page to page. Type page # in box to move directly to a page. Or, click the icons to browse pages. From left to right the icons move you:

1. First page
2. 10 pages previous
3. 1 page previous
4. Reset current page or go to typed page #
5. 1 page next
6. 10 pages next
7. Last page



Report Icons

Each report will display in a program on your computer. Some reports print to PDF file. Other reports will download a data source and display in Microsoft Word®. The appropriate icon will display to show you which "type" of report you are printing.




Section 1: Getting Started

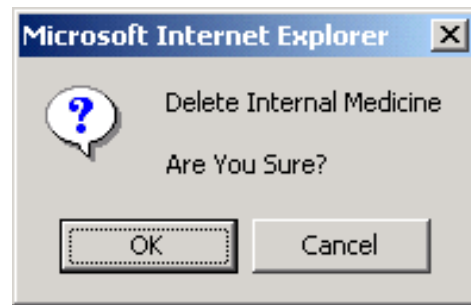
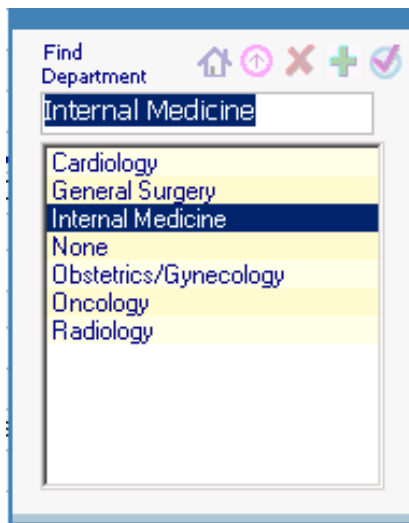
Using the CME WEB TRACKER™ Tools

▶ Pop up Lists (continued)




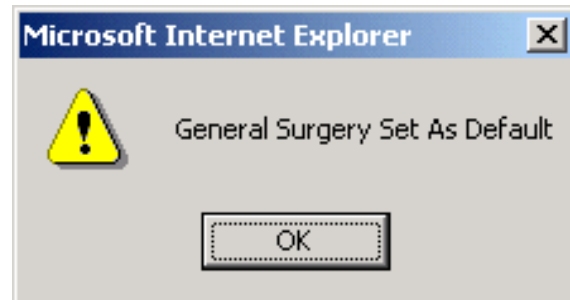
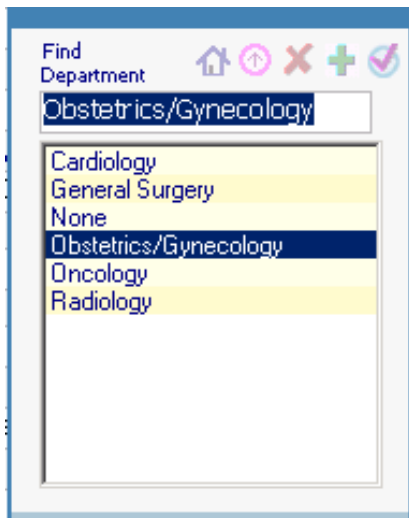
Delete Item from List

Click to highlight the item you wish to delete. Click the delete icon  (or type Alt-Delete on your keyboard) The "delete" dialog will appear. Either click OK or press ENTER to accept.



Set Default

Click to highlight the item you wish to be the default. Click the default icon  (or type Alt-Home on your keyboard) The "default" dialog will appear. Either click OK or press ENTER to accept.



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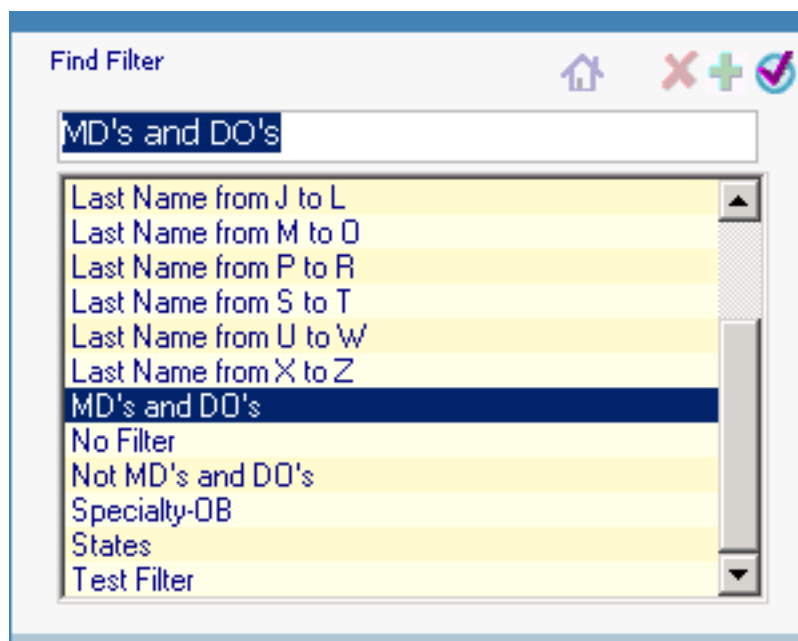
Using the CME WEB TRACKER™ Tools


► Filters



Select an existing filter

Click the Find Filter icon  next to the filter field to pop up the list of filters.



Highlight the filter of your choice and click the select icon , or double click on any filter to select.

Once a filter is selected, your view displays only the filtered records.



The Tab bar will display the number of records that are filtered in this view. All page navigation relates to the filtered records when you have filtered a list.

To change your view and display ALL records, select No Filter from the Find Filter selection list.



Section 1: Getting Started

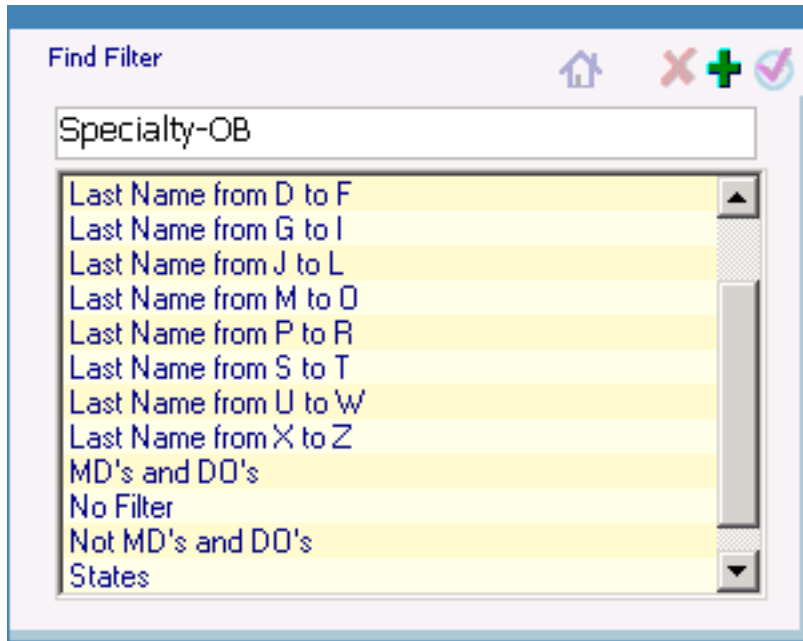
Using the CME WEB TRACKER™ Tools

► Filters

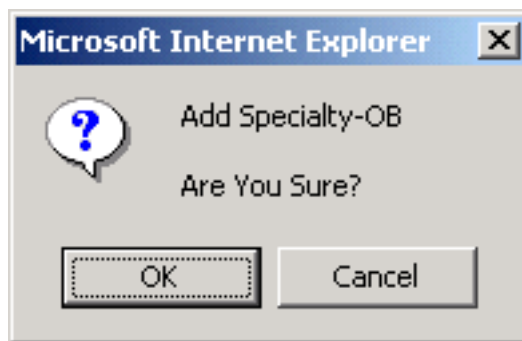


Create a new filter

Click the Find Filter icon  to pop up the list of filters. Type the name of the filter you wish to create and click the ADD icon  to Add the filter.



The prompt dialog to add the filter will be presented. Click OK or press ENTER to continue.



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Using the CME WEB TRACKER™ Tools

► Filters

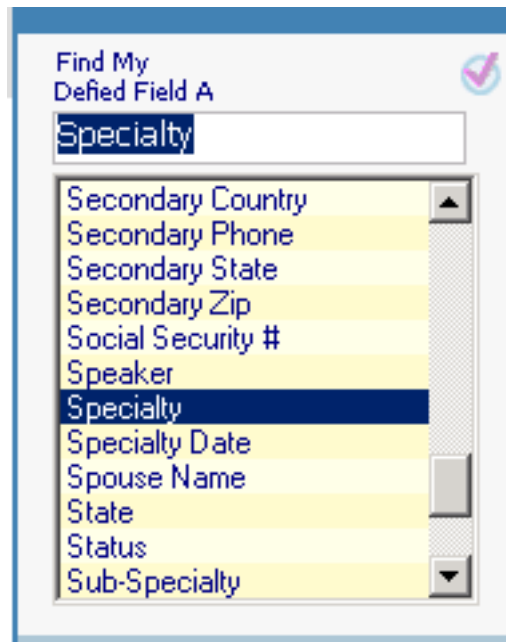


Create a new filter (cont.)

The filter area is now empty, with the new filter selected.



Click on the <<Filter By: Specialty-OB>> heading to bring up the filter field selector.



Double Click the Specialty field to select this field for filtering. The field is now in the criteria definition area. Type in OB.. to specify that you want only records that have a specialty starting with OB to be shown in the filtered view.




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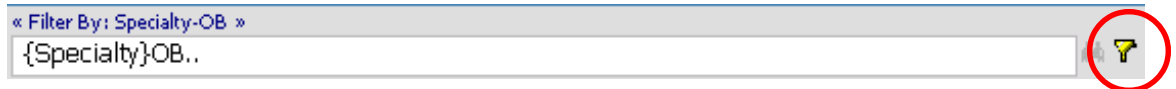
Using the CME WEB TRACKER™ Tools

► Filters

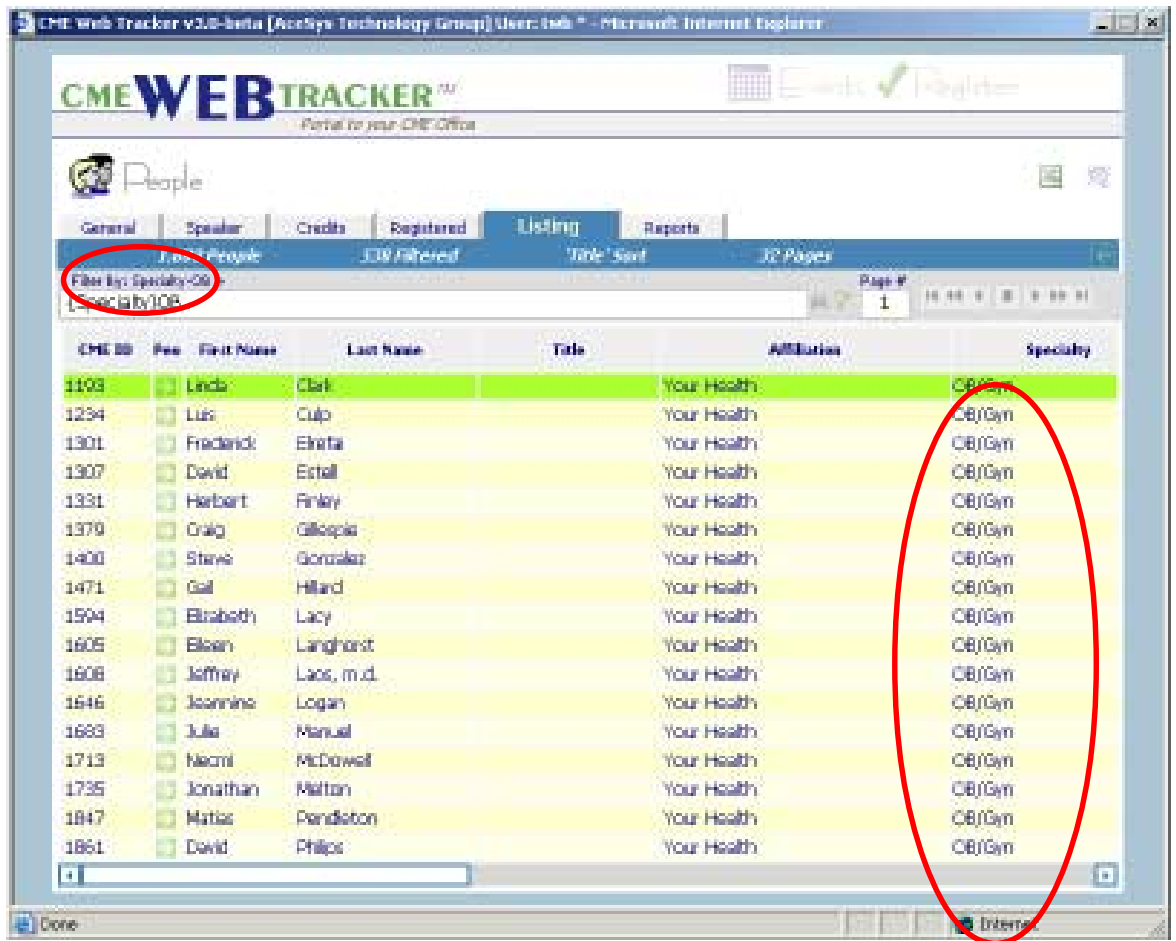




Create a new filter (cont.)

Click the Set Filter icon  to set the filter.



Once the filter is set, only the filtered records are displayed in the view.



 You can add criteria to any filter. Once you change the contents of the filter criteria area, you must click the Set Filter icon  to set the filter and refresh the view.

Section 1: Getting Started

Using the CME WEB TRACKER™ Tools

► Filters



Setting multiple criteria in a filter

Select a filter from the Find Filter selection list. (Specialty-OB)
There is already filter criteria in the criteria area.

« Filter By: Specialty-OB »
 #4

If you wish to further narrow the display, you can select additional fields and add additional criteria. Once the filter is set, only the filtered records are displayed in the view.

The screenshot shows the CME WEB TRACKER interface with a filter applied. The filter criteria are: {Specialty}OB.. {Title}MD.. or DO.. {Status}Active. The table below shows the filtered results.

Last Name	Title	Affiliation	Specialty	Status	Attendee Ty
Blaizem	DO	Your Health	OB/Gyn	Active	Physidan
Ellis	DO	Your Health	OB/Gyn	Active	Physidan
Glecock	DO	Your Health	OB/Gyn	Active	Physidan
Gonzales	DO	Your Health	OB/Gyn	Active	Physidan
Haman	DO	Your Health	OB/Gyn	Active	Physidan
Liveman	DO	Your Health	OB/Gyn	Active	Physidan
Nunneley	DO	Your Health	OB/Gyn	Active	Physidan
Stahman	DO	Your Health	OB/Gyn	Active	Physidan
Trammel	DO	Your Health	OB/Gyn	Active	Physidan
Vedral	DO	Your Health	OB/Gyn	Active	Physidan
Volk	DO	Your Health	OB/Gyn	Active	Physidan
Williams	DO	Your Health	OB/Gyn	Active	Physidan
Walters	DO	Your Health	OB/Gyn	Active	Physidan
Eler	DO	Your Health	OB/Gyn	Active	Physidan
Waldh	DO	Your Health	OB/Gyn	Active	Physidan
Laine	DO	Your Health	OB/Gyn	Active	Physidan
Alkhan	DO	Your Health	OB/Gyn	Active	Physidan

When typing filter criteria you can use the EXACT text, or use a "wildcard". If you are using the specific text that you wish to display, it will be case sensitive. If you choose to use a "wildcard" (..) to indicate anything that may come after the typed text, the criteria is no longer case sensitive.

Section 1: Getting Started

Using the CME WEB TRACKER™ Tools

▶ Filters



Filter operators

When building filter criteria you may make use of the following operators:

> **Greater Than** (alpha, dates, numbers)

examples: {Last Name} > G
{Event Date} > 01/01/05
{Amount} > 1000

< **Less Than** (alpha, dates, numbers)

examples: {Last Name} < C
{Event Date} < 01/01/05
{Amount} < 500

= **Equals** (alpha, dates, numbers)

examples: {Last Name} = Smith
{Event Date} = 01/01/05
{Amount} = 1000

The use of the = operator will result in displaying exactly what equals your criteria.



The use of the = operator is not necessary if you place the field and type the criteria. The equals is assumed. {Last Name}Smith will give you the same results as {Last Name}=Smith

>= **Greater Than or Equal to** (dates, numbers)

examples: {Event Date} >= 01/01/05
{Amount} >= 1000

The use of the >= will result in including the first date or number and all that are greater.

<= **Less Than or Equal to** (dates, numbers)

examples: {Event Date} <= 01/01/05
{Amount} <= 1000

The use of the >= will result in including the first date or number and all that are greater.

NOT (alpha, dates, numbers)

examples: {Last Name}not A., not B., not C..
{Event Date} not 01/01/05
{Amount} not 0



The use of a comma or the 'and' will result in all criteria being utilized.
{Last Name}not A. and not B. and not C..

OR(alpha, dates, numbers)

examples: {Last Name}Smith or Jones
{Event Date} 01/01/05 or 01/03/05
{Amount} 500 or 1000



If your criteria is not a valid statement, an error will pop up. If you get an undesired result, you may try other ways of wording the criteria in order to establish a valid filter. It is a good idea to use the "Test Filter" while testing your theories.

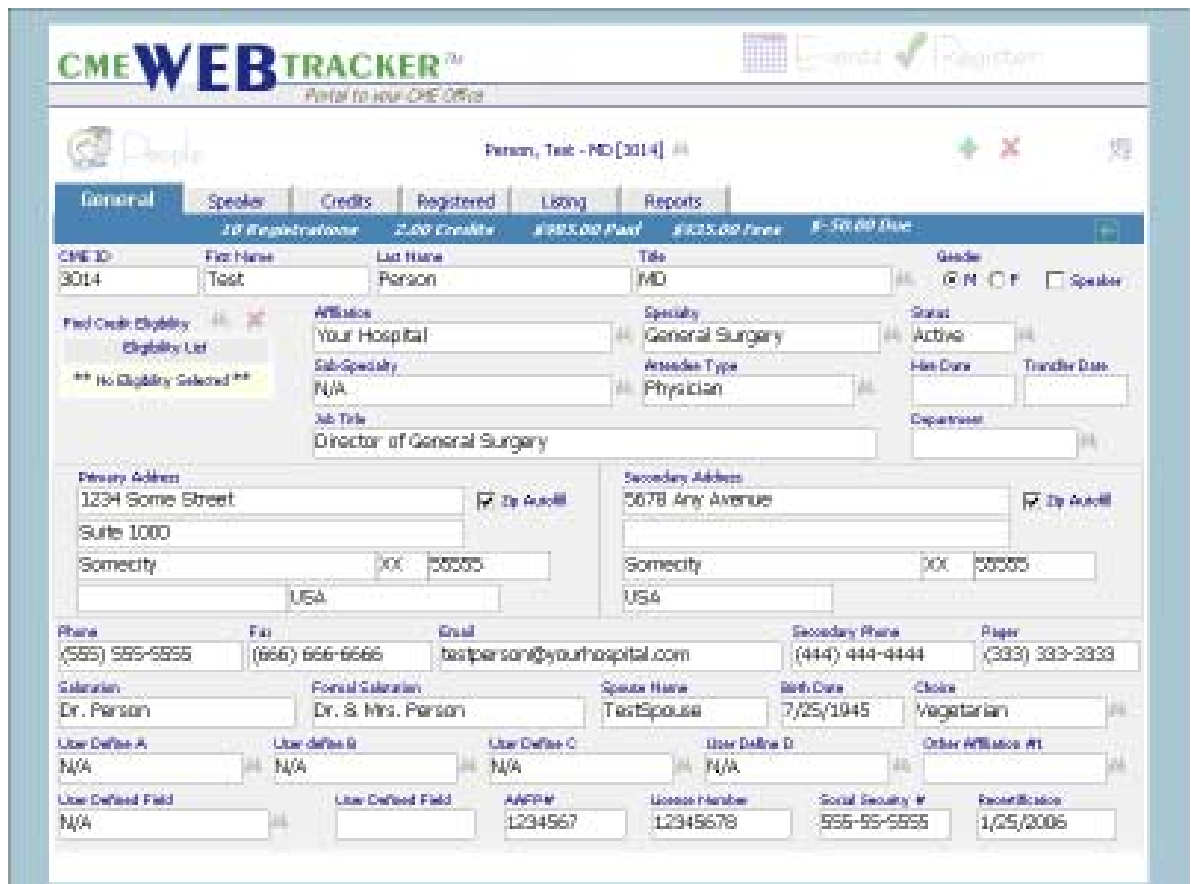
Section 2: People

This section is provided to enter and maintain "People" data.

- General Tab
- Speaker Tab
- Credits Tab
- Registered Tab
- Listing Tab
- Reports Tab

The people you enter in this area become a part of your PEOPLE database and can be viewed individually (GENERAL) or as an group (LISTING).

In the PEOPLE area, you will be storing all of the information that is specific to a person. Once you have entered a person in the PEOPLE area, this person will be available to register for events or to select as a speaker.



The screenshot displays the 'People' management interface in the CME WEB TRACKER system. The page title is 'CME WEB TRACKER™ Portal to your CME Office'. The main heading is 'People' with a sub-heading 'Person, Test - MD [3014]'. Below this is a navigation bar with tabs: 'General', 'Speaker', 'Credits', 'Registered', 'Listing', and 'Reports'. The 'General' tab is active, showing a form for a person with CME ID 3014. The form includes fields for First Name (Test), Last Name (Person), Title (MD), and Gender (Male). It also has sections for 'Fed. Credit Eligibility' (None Selected), 'Affiliation' (Your Hospital), 'Specialty' (General Surgery), 'Status' (Active), 'Private Address' (1234 Some Street, Suite 1000, Somecity, USA), 'Secondary Address' (5678 Any Avenue, Somecity, USA), 'Phone' ((555) 555-5555), 'Fax' ((666) 666-6666), 'Email' (testperson@yourhospital.com), 'Secondary Phone' ((444) 444-4444), 'Pager' ((333) 333-3333), 'Salutation' (Dr. Person), 'Personal Salutation' (Dr. & Mrs. Person), 'Spouse Name' (TestSpouse), 'Birth Date' (7/25/1945), 'Diet' (Vegetarian), and 'User Defined Fields' (A-D, A-F). The 'User Defined Field' section shows values for A-F: N/A, N/A, N/A, N/A, N/A, and 1/25/2006.

Section 2: People


Entering and working with People

▶ General Tab

The General Tab can be used for collecting any data pertaining to people you will be tracking in your system.



New People

To begin entering a new person, press the Add icon  in the upper right hand corner of your screen. The cursor (highlight) will move to the ID field. An ID will be assigned automatically or you can type in an ID number by which you will track this individual. The ID can be numerical or alphabetical. Next, the cursor moves to **FIRST NAME**. Type in the first name and middle initial (if preferred) of the person. The next field is for the **LAST NAME**.

After typing the last name you will arrive in the **TITLE** field.



If you have set a list to "AutoPop", the title popup will automatically pop up for you to select a title. If you choose not to "AutoPop" the list, you may type in the field, or you may type ALT- Down Arrow to pop up the list from the keyboard. Clicking the binoculars will pop up the list as well. This applies to all fields with associated popup lists.

Type or select a TITLE for this person. The First, Last and Title fields are all mandatory and will be populated with "N/A" if you do not enter any data.

Upon leaving the title field, the cursor will move to the **GENDER** field. Select a gender (M or F) by clicking once on your choice, or by moving to your choice with the arrow keys and pressing the space bar. Clicking on the **SPEAKER** checkbox indicates this person is a speaker.

AFFILIATION indicates the institution that the person is affiliated with. This field may be completed by using the popup list that has been customized to your program. (See info on popup lists).

The fields, **SPECIALTY** and **SUB-SPECIALTY** are for the names or abbreviations of this entry's specialty or sub-specialty.

STATUS can be used for this person's status with your institution (i.e. Active, Retired, Provisional, Courtesy, etc.).

The **ATTENDEE TYPE** you select here will transfer to the register area when you are registering this person. Continue moving through the fields (pressing ENTER or TAB). **HIRE DATE**, **TRANSFER DATE**, **JOB TITLE** and **DEPARTMENT** are optional.



If you set up a fee schedule for an event, this person's "attendee type" will automatically assign a fee for his/her type.

Section 2:  People

Entering and working with People

▶ **General Tab****New People (cont.)**

Credit Eligibility List popup (Click  to access)


Before using this list, be sure you know which type of credit eligibility your organization has chosen to use. This popup edit list allows each person entered in the CME WEB TRACKER to be assigned the types of credit for which they are eligible when attending events. Select the type of credit and press enter. The selection will be listed in the person's credit eligibility list. Several types of credit may be listed for one person if necessary. Upon assigning credit in the Register area, each person will be given the appropriate credit.

The **PRIMARY Address** and **SECONDARY ADDRESS** areas contain fields for **ADDRESS1, ADDRESS2, CITY, STATE, ZIP, COUNTY and COUNTRY.**



Click the "Zip Auto Fill" Checkbox on the right hand side of the address block to save time while entering addresses. You will type in the address and zip code and the CME Web Tracker will fill in the City and State.

You also have fields here for **PHONE, FAX, EMAIL, SECONDARY PHONE, PAGER, SALUTATION, FORMAL SALUTATION** and **SPOUSE NAME** and **BIRTHDATE.**

After completing the above fields, your cursor will move to the **CHOICE** field at the Choice would relate to a general meal choice for this person if it applies. You may also wish to populate this field with any type of choice that relates to the person by clicking the  icon. The **Find Choice** popup appears, allowing you to add to the list.

The following fields are all **User Defined Fields.** They can be named by clicking twice on the field name (User Defined A, B, C or D, E, F, G) and typing the name in the pop-up. Then you can populate the list with the type of data appropriate for selection.

Let's say you need to track the "height" of all of the people in your database. Simply Click twice on User A, Fill in the name Height in the Naming dialog box and then click OK. The name of your field has changed. Now, customize your selection popup list with appropriate choices. You can add or delete heights as you see fit.



Once you have "defined" a user field, you should not change that particular field in the future. Any data collected here will remain. If you need additional fields, you will use USER B, C, etc.

The remaining fields include numbers and dates that you may want to collect for each person. (**Customer ID, AAFP#, License#, Social Security# and Recertification**)



All date fields are formatted automatically so all you have to do is type in the numbers and the "/" appears automatically.

Section 2:




Entering and working with People



► General Tab



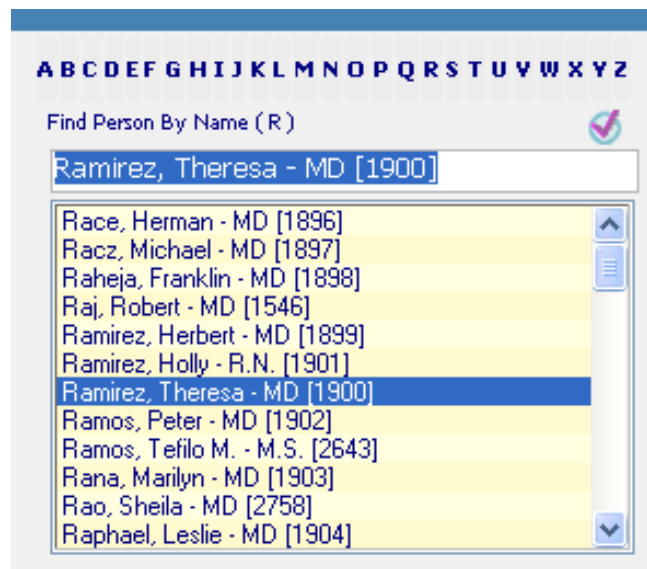
Find Person Drop Down

To find a person currently in your PEOPLE database, the CME WEB TRACKER Staff Edition™ provides the ability to browse for the name or speed search by typing.

Click on the  icon next to the active person, or simply press ALT / from your keyboard. The "Find Person By Name" popup appears, showing what letter your current list is in. There are several ways to find the person from this point:

- 1) Click the letter of your choice from the alphabet at the top. This refreshes the list with only names beginning with that letter. Type the first letters of the last name until the person you are looking for is highlighted. Once highlighted, press ENTER or click the  icon and the program will move to that point in the database.
- 2) Click the letter of your choice from the alphabet at the top. Use the scroll bar on the right to find the person. Double click on the name. The program will move to that point in the database.
- 3) You can also speed search from the keyboard. Simply press ALT and the letter that specifies the first letter of the last name. Select the person by clicking the  icon or double clicking the person's name.

Once you have located a person in your database, you will be viewing the complete record for that person. Changes and information updates can be made easily.



Section 2:  People

Entering and working with People

▶ **Speaker Data Tab**

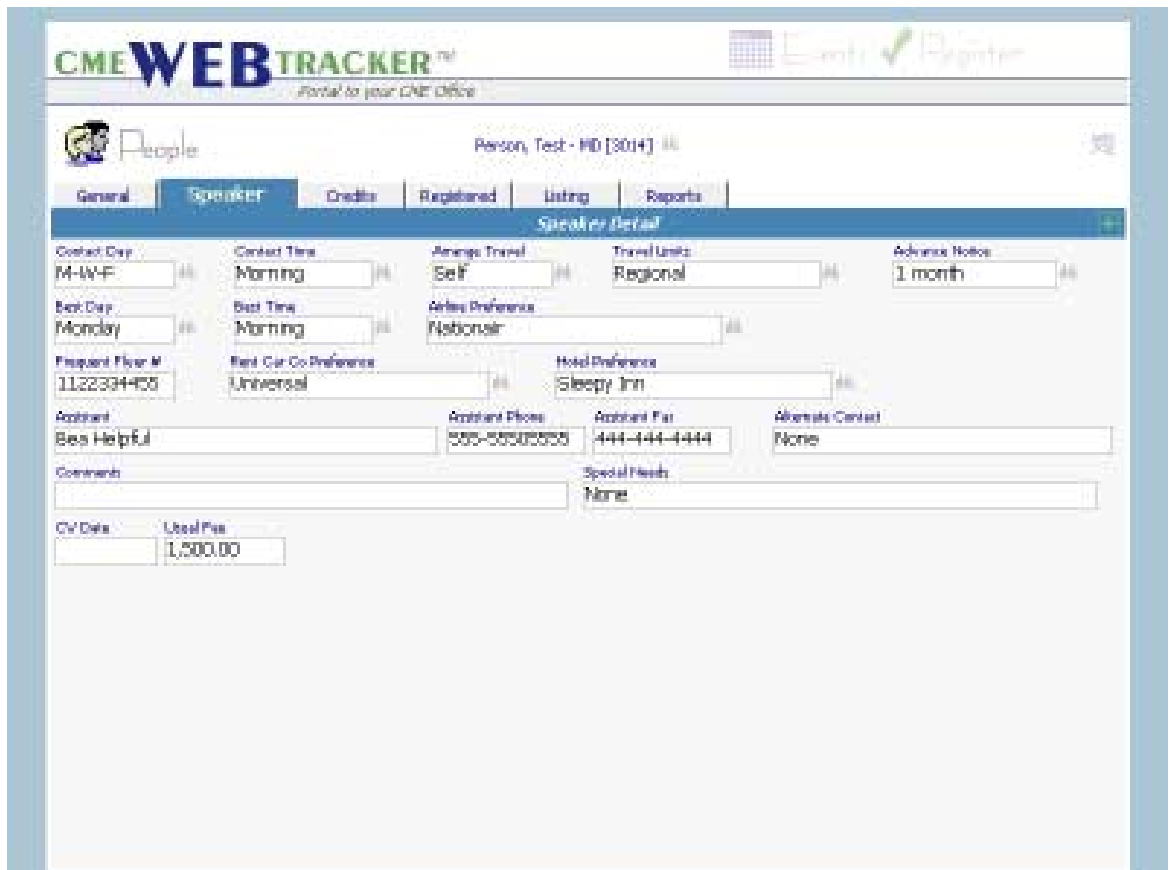


New People

As you are adding a new person, the Speaker Data Tab is available for specific information regarding a speaker.

Contact Day, Contact Time, Arrange Travel, Travel Limits, Advance Notice, Best Day, Best time, Airline Preference, Frequent Flyer #, Rent Car Co Preference, Hotel Preference, Assistant, Asst. Phone, Asst. Fax, Alternate Contact, Comments and Special Needs are the basic fields. You will make selections from the drop-down edit lists for each speaker.

CV Date can be used to track the most recent Curriculum Vitae and **Usual Fee** to record the typical fee paid this person. This can be valuable information when comparing speakers in the future.



CME WEB TRACKER™
Portal to your CME Office

Events Register

Person: Test - MD [3014]

General | **Speaker** | Credits | Registered | Listing | Reports

Speaker Detail

Contact Day M-W-F	Contact Time Morning	Arrange Travel Self	Travel Limits Regional	Advance Notice 1 month
Best Day Monday	Best Time Morning	Airline Preference National		
Frequent Flyer # 1122334455	Rent Car Co Preference Universal	Hotel Preference Sleepy Inn		
Assistant Bess Helpful	Assistant Phone 555-5550555	Assistant Fax 444-444-4444	Alternate Contact None	
Comments	Special Needs None			
CV Date	Usual Fee 1,500.00			

Section 2: People

Entering and working with People

▶ Credits Tab



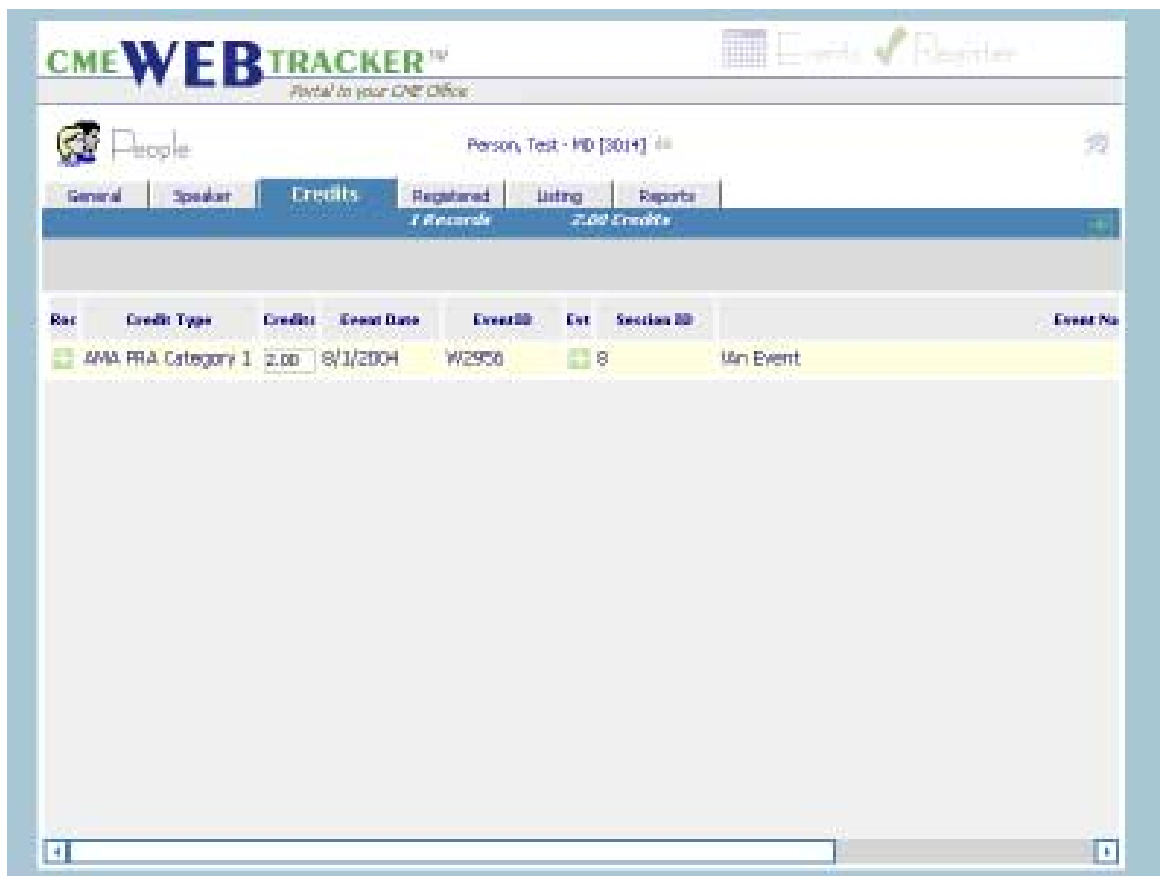
Verifying Credits

The Credits Tab contains a table frame listing of an individual's credits earned. As you enter this from any area, the active person will be displayed.

This view is compiled through any registration credits you have recorded for this person. You can see a TOTAL of credits earned in the tab bar as "Credited".



You can adjust a person's credits by clicking in the Credits column and typing in the adjusted credits.



Rec	Credit Type	Credits	Event Date	Event ID	Ext	Section ID	Event Name
1	AMA PRA Category 1	2.00	8/1/2004	W2950	8	1	An Event

Section 2:  People

Entering and working with People

▶ **Registered Tab**




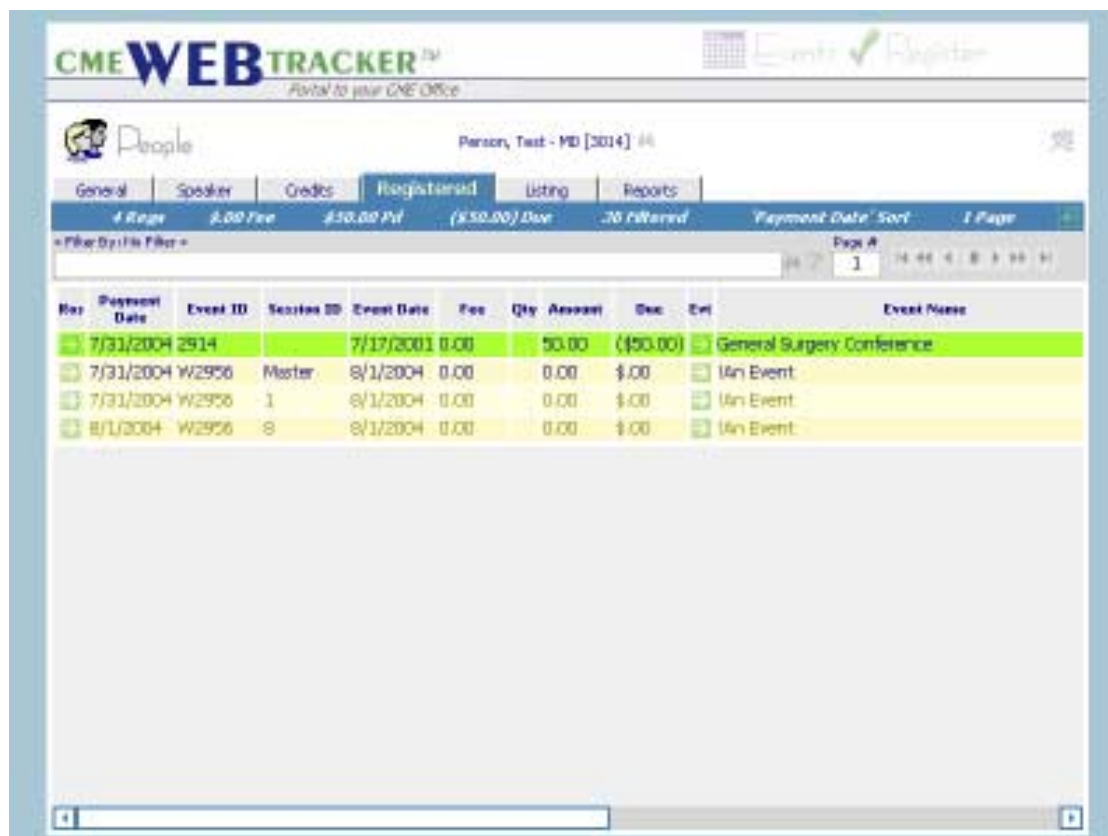
Browsing the Registered Tab

The Registered Tab provides a view of all the Events a person has been registered for. The information is listed in table format, by which you can advance the pages using the page navigator buttons located in the upper right corner.

You can sort the list by clicking on the header at the top of a particular column. When you sort a list by a particular column, a notation appears in the Tab Bar showing the "Sort" that you chose.

To view additional columns to the right, use the horizontal scroll bar at the bottom of the page.

You cannot edit data in this area. To view details for a particular registration, simply double-click on the line item and you will be moved to the register page. Use the "Go" buttons  for the Roster or Event in order to move to this particular event or to the roster for this event. Be sure to highlight the particular record you are interested in before moving to other areas.



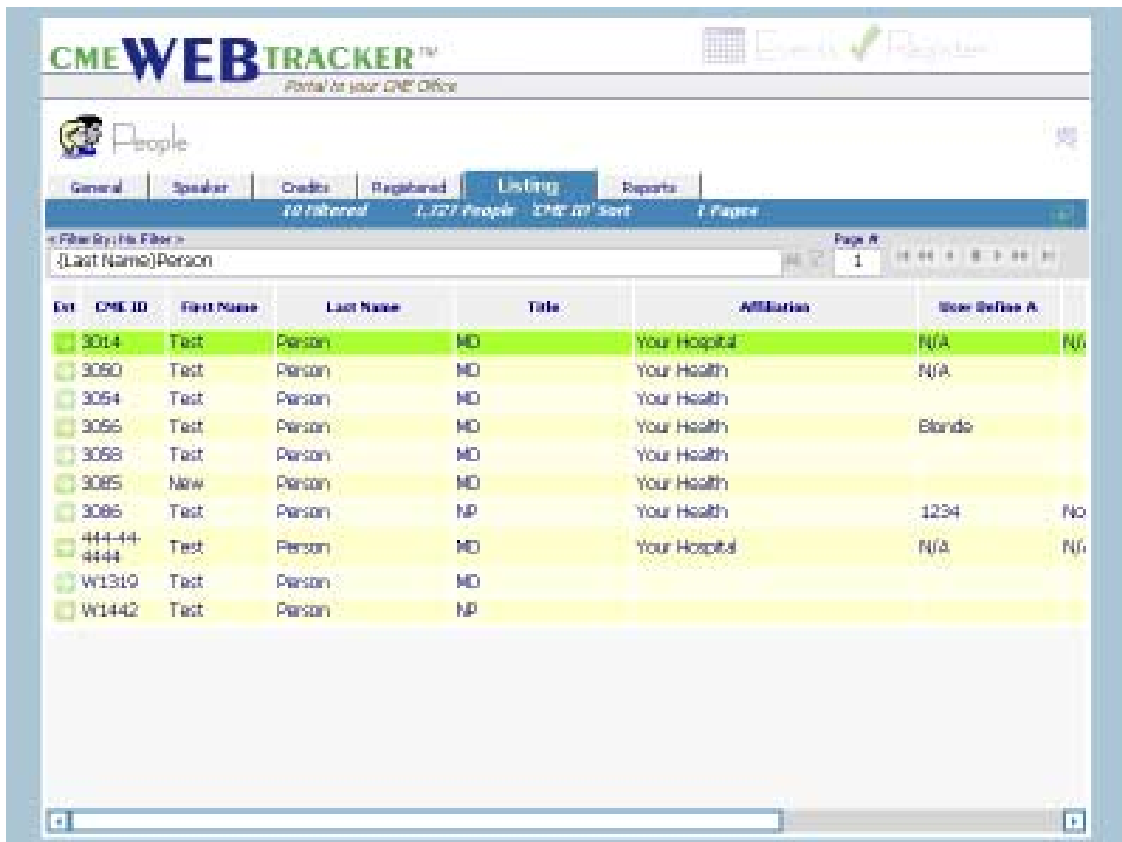
Section 2: People











Entering and working with People

▶ Listing Tab


▲ Browsing the Listing Tab


The Listing Area provides a different view of your People information. Basic information is listed in a table format, with a horizontal scroll bar at the bottom and a page navigator at the upper right. To view People further down the list, click on the arrows in the page navigator to view the information you choose.



Evt	CME ID	First Name	Last Name	Title	Affiliation	User Define A
	3014	Test	Person	MD	Your Hospital	N/A
	3090	Test	Person	MD	Your Health	N/A
	3094	Test	Person	MD	Your Health	
	3096	Test	Person	MD	Your Health	Blonde
	3068	Test	Person	MD	Your Health	
	3085	New	Person	MD	Your Health	
	3086	Test	Person	NP	Your Health	1234
	444-44 4444	Test	Person	MD	Your Hospital	N/A
	W1310	Test	Person	MD		
	W1442	Test	Person	NP		

This listing can be manipulated by using the Horizontal Scroll bar, or you can sort the list by clicking on the title at the top of a particular column. When you sort the list by a particular column, a notation appears in the tab bar showing how the list is "sorted".

You can also "filter" the record view. To view filtered records, you will click the  to select a filter. See the "Filters" area to learn how to build new filters.

 Click on the "Go" button in the Evt column for the person you wish to select. This will move you to the People General Tab and view this specific person's record.

Section 2:  People

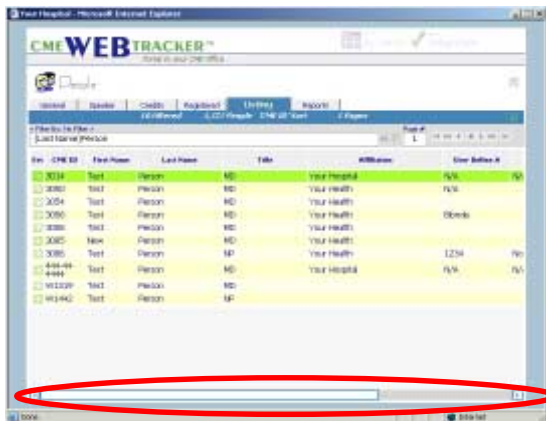
Entering and working with People

▶ Listing Tab



Browsing the People Listing

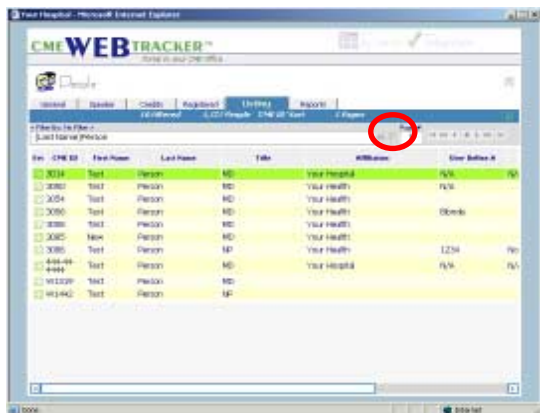
The standard tools for a list screen are available in the People Listing Tab.





Searching through table:

By using the horizontal scroll arrow on the bottom of the screen you may move across the data to find more information for a particular entry.

The horizontal scroll arrow allows for viewing additional information such as SPECIALITY, STATUS, ATTENDEE TYPE, DEPARTMENT, CITY, STATE, USER DEFINED FIELDS (A, B, C, E, F, G) AND CUSTOMER ID that are not visible when the screen opens.



Select Filter and Set Filter Buttons:

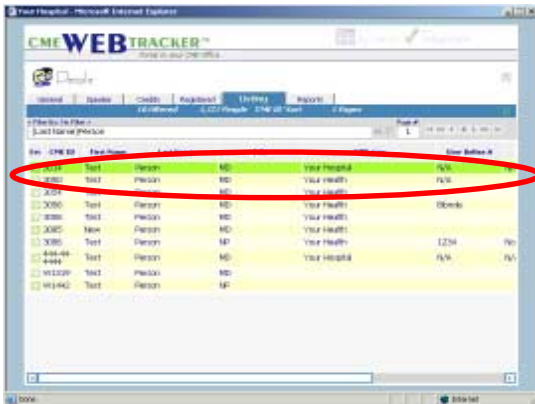
Filter individual entries or groups by clicking the  icon to select a pre-defined filter. Or define a new filter and click the  icon to engage your new filter.

Section 2:  People

Entering and working with People

▶ Listing Tab

▲ Browsing the People Listing (cont.)



Sorting the Listing

Click on any column header to sort the People Listing by ID, First Name, Last Name, Title etc.

For instance, if you wish to sort by Last Name, simply click on the Last Name column header and your People Listing will be sorted in alphabetical order by last Name.



You can also speed search names by doing the following:

Press "Alt + first letter of last name" will move to the first person who's last name begins with that letter in the list.



Pressing "Ctrl + Z" (Locate) will popup the Explorer User Prompt. When you use this operator, you only need specify a part of what you want and the rest is "wild". For example, if you were to specify: ..John.. you would be saying a name that begins with "something", has "J-o-h-n" somewhere within and ends with "something". You are not specifying what the "something" is. It can be any letters or numbers. So, the following names would meet the criteria: Johnson, Adams-Johnson and TiJohn. Enter information and press OK. The first name that meets your search criteria will be highlighted. Pressing "Ctrl + A" (Locate next) will go to the next record with that criteria. Continue to locate additional records by pressing Ctrl + A until your record is found.

Section 2: People

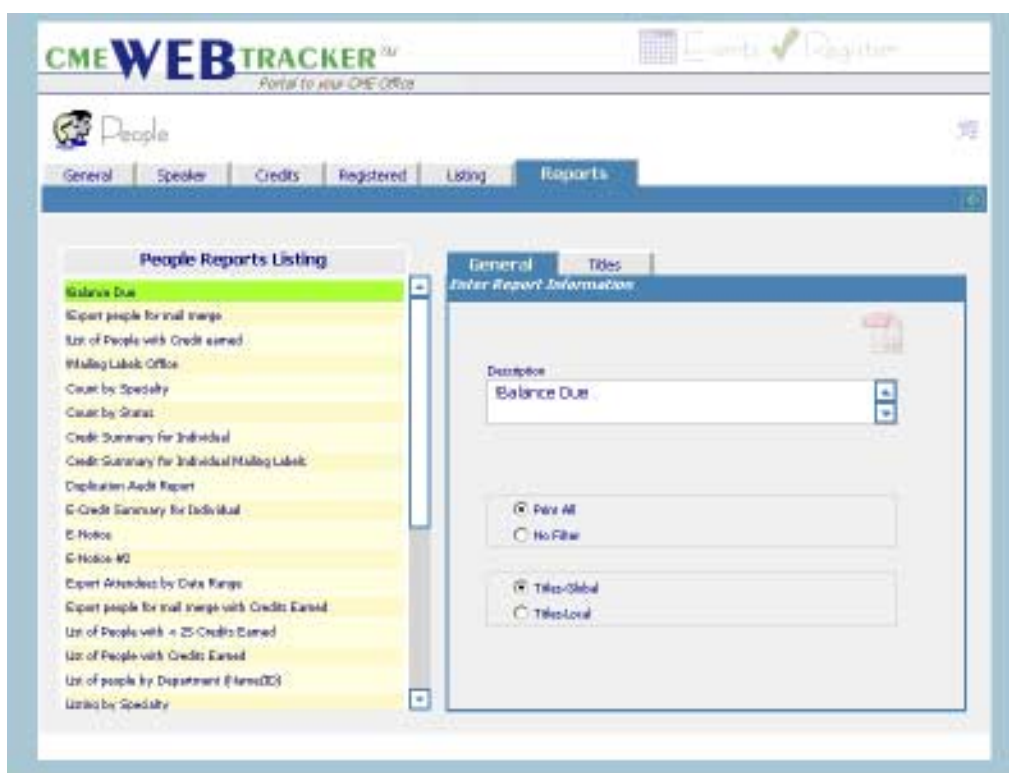
Entering and working with People

▶ Reports Tab



Printing new Reports

A complete Listing of Reports specific to the People Area is located in the Reports Tab.



 Access a Report by clicking it to highlight. The Report will then be found in the description box on the right.

Section 2:  People

Report Listing

▶ People Report Listing



The Report Screen

The report screen is split into a listing area on the left and an editing area on the right. Each report is defined by its description. You can change the description of any report on the right hand side and it will be alphabetically listed on the left hand side.

For each report you can choose to "Print All" or "Print Filter" (the filter name will be listed). If you print the filtered records, only those records that meet the filter criteria will be printed.

You may choose to use the "Global Titles" or the "Local Titles". The global titles are available to all users. The local titles are specific to each user account.



Defining Your Reports

DESCRIPTION: This is the name of the report. The reports in the CME WEB TRACKER Staff Edition were assigned titles as they were created. However, these names can be changed if there is another name or description that is more appropriate in your office. To do this, select the Report, and change the name in the Description box to the right. The report will be the same, but the name has been customized.

ORDER OF REPORTS: The order of the reports in the listing is alphabetical. To find the report needed, use the scroll bar to scroll through the list and view the names. The order can be changed if there are certain reports that you run most often, that would be more convenient to find at the top of the list.

CHANGING ORDER OF REPORTS: Place an A,B,C, etc in front of any report name, followed by a (> sign) to reassign the order of the reports. For example, if the "Mailing Labels" report is the one that you would like at the top of the list under reports, then change the name (as described above) to A>Mailing Labels. This places it at the top of the list. (The A> will not appear on the printed report.)



Report "Titles"

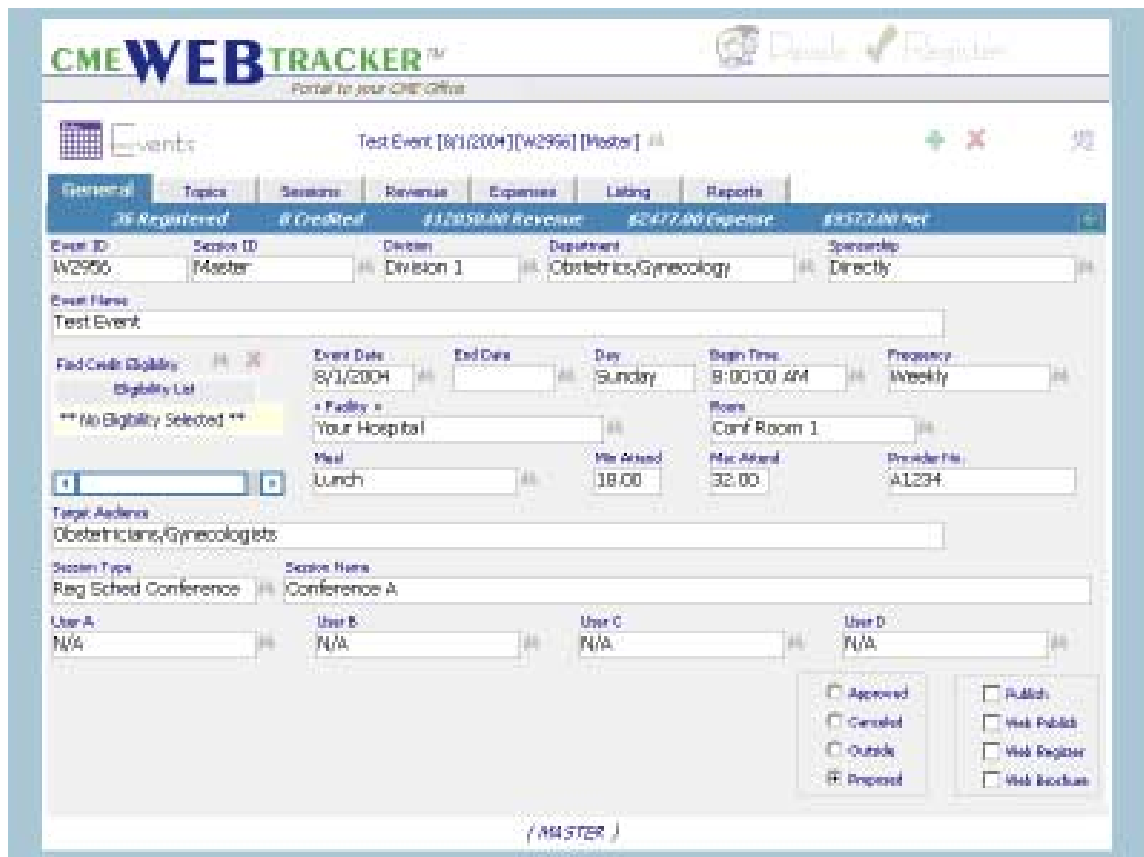
Use this area to define the "Global" or "Local" Titles for a report. There are multiple lines that can appear at the top of each "PDF" report as defined here.

Section 3:  Events

This area was designed to assist in all aspects of planning, preparation, and presentation of an Event. The following tabs are described in this guide:

- **General Tab** - Defining the Event
- **Topics** - General, Objectives, Needs and Plan
- **Sessions** - Sessions associated with the Event
- **Revenue** - Revenue for the Event
- **Expenses** - Expenses for the Event
- **Listing** - List of all Events
- **Reports** - Reports that pertain to Events

When planning an event, you will assign an ID # (or it will be assigned automatically). The system will then identify this event either by it's name or by it's number. You can view the information for a specific event in the GENERAL Tab and view the events database in it's entirety in the LISTING Tab. The other tabs all pertain to one single event. The event you are viewing is shown at the top of the page.



Section 3: Events

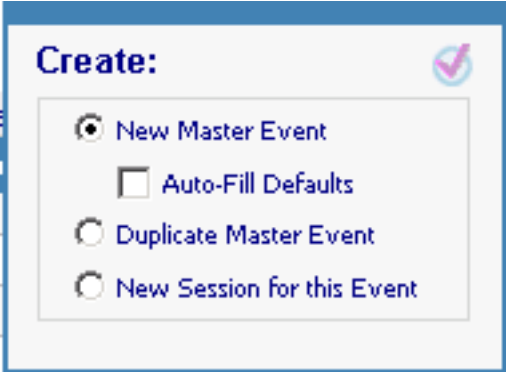
Planning and Entering Events

▶ General Tab



New Events

From the Events...General Tab, click the  icon and a popup appears prompting you to choose a New Master Event, a Duplicate Master Event or New Sessions for this Event.



Each event will have a designation of "Master" or "Session" displayed at the bottom of the Event General screen. All events are "Master" events unless created as "Sessions" of an already existing "Master" event.


Once you have created a new event and have either accepted or created an event ID, Press ENTER and you will be in the **SESSION ID** field. The session ID is an additional identification you may want to use if you have multiple sessions for this event.

After identifying your session ID (N/A if you don't want to use Session ID), you will be in the **DIVISION** Field. Select a Division using the speed search to begin typing the department until it is located on the list below. **DEPARTMENT** and **SPONSORSHIP** both have popups that you will speed search for the appropriate selections.

Type the **EVENT NAME** for this Event.

In the **CREDIT ELIGIBILITY** box, click on "Select Type" to choose the type of credit offered. The "Edit Hours" popup will be automatic and you can select the number of hours offered for this credit type. Proceed to add credit types and hours as needed.

Continue by entering **DATES, TIME, FREQUENCY, FACILITY, ROOM** and **MEAL**.

 If your facility is not on the list, you can add a facility by clicking on the facility title <<Facility>>. If you'd like to record an address and additional information for the facility (useful for letters and notices), all information is entered on the Facility Maintenance Screen.

Section 3:  Events

Planning and Entering Events

▶ General Tab



New Events (Cont.)

Type in **MIN ATTENDEES** and **MAX ATTENDEES** if you would like to track these items. Any numbers you type in these areas are used in the Register area to report your status based on these decisions.

The **Provider No.** field is intended for an identifying number Pharmaceutical Events.

The **TARGET AUDIENCE** field is intended for printing on your notices/flyers. This field would contain a phrase or sentence that describes the audience for whom the meeting is intended.

SESSION TYPE can be used in a variety of ways. You can use this field to identify a meeting as a Regularly Scheduled Program, a Course, Enduring Material, etc. or you can use it in a manner customized to your organization. Since you can sort and mark records according to any fields, you might like to use this field to further identify an event.

SESSION NAME is used to identify the individual session (Friday Morning Session, Workshop A, etc.)

The following fields are all **user defined fields**. They can all be re-named by clicking twice on the field name (User Defined A, B, C or D) and the Explorer User Prompt popup appears. Simply type in the new name and click OK.

The **EVENT STATUS** checkboxes are intended for you to identify the status of each event. If an event is identified as "Outside", it will not be included in your annual reports. If an event is "Canceled", it will not be included in some reports. You can use the "Proposed" and "Approved" statuses for tracking each events progress.

The four check boxes in the lower right hand corner are for the WEB Tracker publishing engine. (optional) Publish is for calendars, Web Publish is for the Web, Web Register is for Online registration, and Web Brochure will display a brochure button for the event. Each of these selections is specific to the event.


Section 3:  Events

Planning and Entering



▶ **General Tab**



Duplicating Events

For events that occur frequently, duplicating the event is an excellent way to save time and effort. First, find the event you wish to duplicate from the drop-down list. Then click the  icon.

Event Duplication Button

(1) Click Duplicate Master Event for duplicating the current event and click the select icon . You can choose to duplicate the entire event or just part of the event. Event Duplication is handy for duplicating grand rounds that frequently take place on the same day and time. (2) Make your selections and click the select icon  to begin duplication.

1

2

The Event Duplicator dialog box pops up over your current Event.

The current event is the one that you will be duplicating.

Type in the number of days between events and the number of events you wish to duplicate.

Check off the items you would like to retain in the new events.

While the duplicator is generating additional events, "Duplicating" shows on the screen. Behind this dialog box, you will see new events being created. Each event is assigned a new event number and a date, duplicating the other information you have chosen.

Section 3: Events




Planning and Entering Events

► Topics Tab



Adding Topics to your Event

The TOPICS screen is divided into several areas. On the left, there is a tableframe, listing all of the topics for this event. On the right is a "notebook" that will contain additional information about each topic.

You will enter a new topic by pressing the  icon. If you press enter from the **DATE** field, it will automatically contain the date of the event. Then select a Begin Time and End Time. If you don't find the times you need, use the  button or ALT-INS to add them. Type in the name of the topic in the TOPIC field and then select the speaker(s) in the **SPEAKER** field. This topic will fill in on the tableframe at the left. To enter subsequent titles, press  and then you can type in the Date, Start Time, End Time and Topic.



Note: if you leave the topic blank, the system will automatically delete the item.

To change an existing topic, click the topic in the listing table at the left, and the item will be in the edit area on the right. Click the field you wish to change and type the change.

Section 3:  Events

Planning and Entering Events

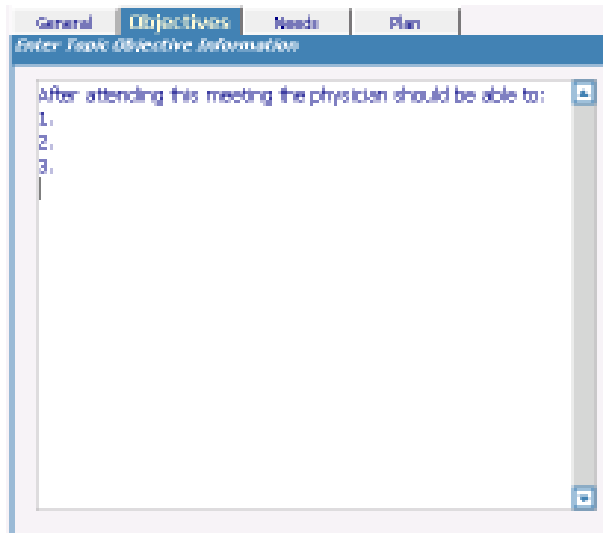
▶ **Topics Tab**



Objectives, Needs and Plan

All of the information in the Objectives, Needs and Plan Tabs will be reported in the Event Planning/Proposal report found in the Report Listing.

The **OBJECTIVES** Tab is available for listing all of the defined objectives for each topic. Type your objectives in paragraph or outline form.



General | **Objectives** | Needs | Plan

Enter Topic Objective Information

After attending this meeting the physician should be able to:

- 1.
- 2.
- 3.

|

Section 3:

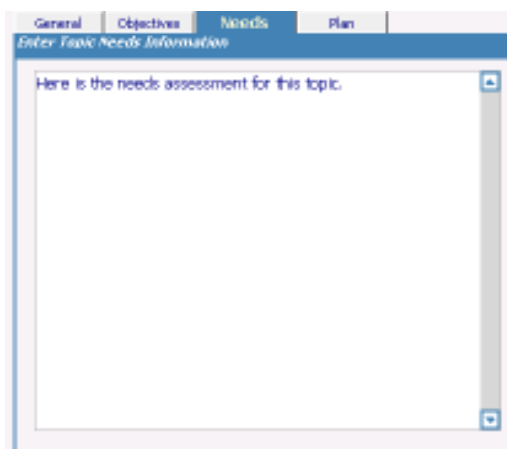
Planning and Entering Events



► **Topics Tab**

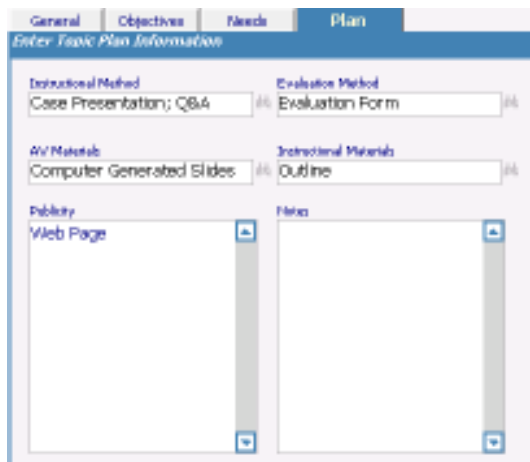


Objectives, Needs and Plan (cont.)

The **Needs Tab** is used to identify your needs assessment for this topic.



The **Plan Tab** gives you the opportunity to outline your Plan as it relates to this topic. Instruction Method, Method of Evaluation, AV Materials and Instructional materials are all standard popup list fields. You can select items from the lists, add items with  or ALT-INS and delete items with  or ALT-DELETE. The Publicity area gives you an opportunity to compile a list with multiple publicity items.




Section 3:

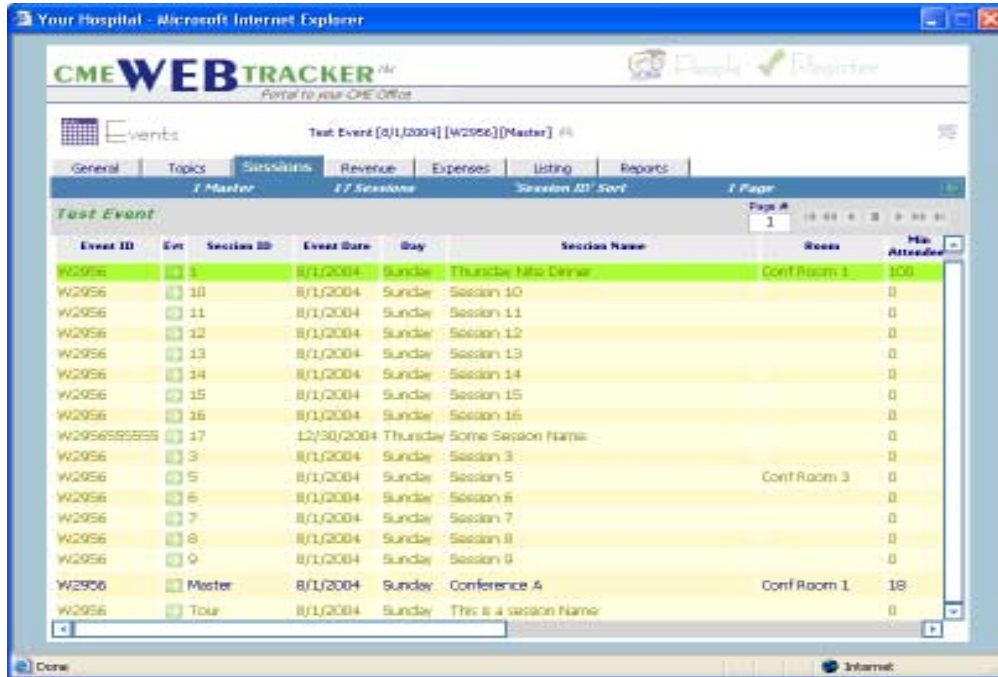
Planning and Entering Events

▶ Sessions Tab



Viewing Sessions

The "Master" event and all related sessions are displayed on this screen. Click twice on any session to display the detail for that session in the General Tab. Or, click the "GO" icon  to change the "active" event and display the detail in the General Tab.



Section 3:  Events

Planning and Entering Events

▶ **Revenue Tab**



Entering Revenues

The Revenue Tab provides you an area to track revenues for each event. This screen contains:

Revenue Date: Date Revenue received-press enter for Today

Revenue Type: Click for PopUp and Select Revenue Type, or type in a unique revenue type that you do not wish to add to the list and press ENTER.

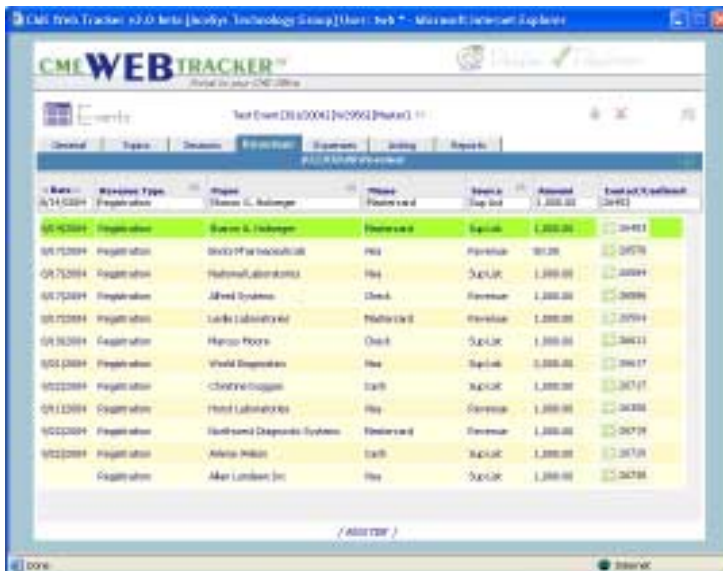
Payor: Click to select Payor or type in a unique payor

Memo: Type Check number here

Source: You may wish to put initials for the person who entered the record here.

Amount: You may type in amount. No \$ sign is necessary. If the amount is a whole number, you do not have to type in the decimal or zeros.


Contact/Confirm #: This field is populated automatically for registration revenue. You may wish to type in a contact for other types of revenue.




Select any FILTER to filter the view by the criteria of your choice. You can create new filters for future use.

Sort the revenue records by clicking on the edit field name at the top of the column. For example, if you want to sort alphabetically by "Payor", click on title for the payor field.

Click on Excel icon to export data to an E-spreadsheet. You can export all revenue data or filtered revenue data.

Here you have a listing for revenues, and an edit area above the listing. To enter a new revenue item, click on the  icon in the upper right hand area of the screen.

The date will be highlighted. You can type in a date or press enter to accept today's date. Next, you will select a revenue type. Once you have selected a revenue type, you will move to the payor field and select a payor. Then you will type in the "memo", select a "source" and type in an "amount". When you have completed the information for an item, note that it is in the listing below. You may continue to add items by pressing the  icon.



Any registration revenues will be added to the Revenue area automatically when a person is registered. You cannot change any automatic entries from this area, but you can go back to Register to change a dollar amount entry for an individual registration. Click on the "GO" button in the Contact/Confirm# column to move to the attached Registration.

Section 3:  Events

Planning and Entering Events

► ExpenseTab



Entering Expenses

The Expense Tab provides an area to track expenses for each event. This screen contains:

Date: Date expense paid-press enter for Today

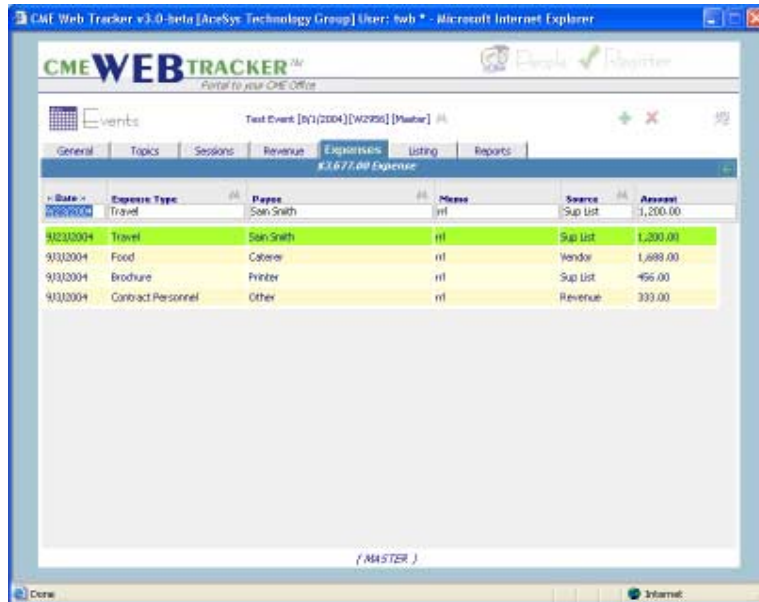
Expense Type: Click for PopUp and Select Expense Type, or type in a unique expense type

Payee: Click to select Payee or type in a unique payee-ENTER

Memo: Type Check number here

Source: You may wish to put initials for the person who entered here.


Amount: You may type in amount. No \$ sign is necessary. If the amount is a whole number, you do not have to type in the decimal or zeros.




Select any FILTER to filter the view by the criteria of your choice. You can create new filters for future use.

Sort the expense records by clicking on the edit field name at the top of the column. For example, if you want to sort alphabetically by "Payee", click on title for the payor field.

Click on Excel icon to export data to spreadsheet. You can export all revenue data or filtered revenue data.

Here you have a listing for expenses and the edit area above the listing. For a new expense, click on the  icon in the upper right hand area of your screen.

The date will be highlighted. You can type in a date or press enter to accept today's date. Next, you will select an expense item. Once you have selected an expense item, you will select or type in a payee, type in a check number and an amount. You do not need to type in the \$ sign. When you have completed the information for an item, note that it is in the listing below. You may continue to add items by pressing the  icon.

Section 3:  Events

Planning and Entering Events

▶ Revenue/Expenses



Entering Revenues and Expenses

Filling in your expenses and revenues in the REVENUE and EXPENSE areas is very similar. Both screens use an edit area and a "TableFrame", to view the information in list form.




Expenses

Click on the Date field and type in the entry date. If left empty, Today's date will be automatic.

Your cursor will move to the expense type field where you will select a type from the popup.

Select the expense type and your cursor will move to the Expense field.

Select or type a payee, memo, source and amount, pressing enter between fields. Your cursor will move to the tableframe. Press the  icon for additional expenses.




Revenue

Click on the Date field and type in the entry date. If left empty, Today's date will be automatic.

Your cursor will move to the Revenue Type field with a popup list.

Select the revenue type from the list and your cursor will move to the Revenue field.

Select or Type in the payor, memo, source and amount of the revenue by pressing enter between fields. Your cursor will move to the tableframe. Click the  icon for additional revenue items.




Totals

All totals are automatically calculated, based on the amounts you entered. These totals will pass to any revenue/expense reports.



Deleting Revenues and Expenses

You can delete any specific financial items entered in these areas by clicking on the line item and clicking the  icon to delete.

Section 3: Events

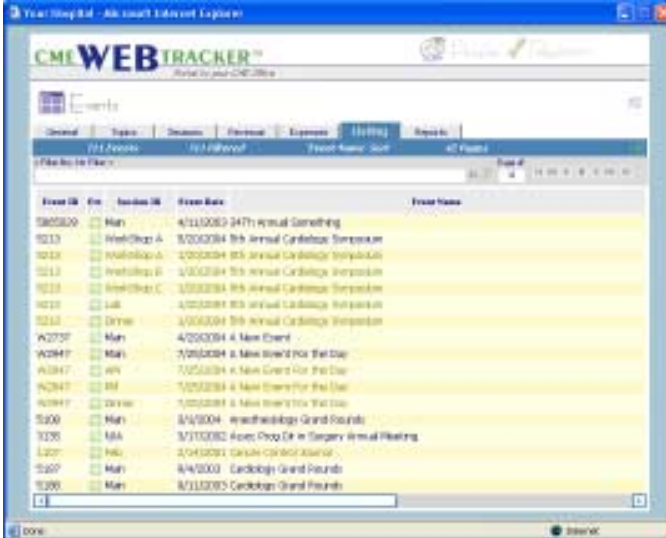
Planning and Entering Events

▶ Listing Tab



Viewing and Sorting Events

The LISTING TAB displays a listing of all the events that you have entered in the GENERAL TAB area to provide a different view of your events. Basic event information is listed in a table format, with a horizontal scroll bar to view fields at the right. Use the page navigator to move to additional pages.



Event ID	Evt	Session ID	Event Date	Event Name
1205200	Man		4/11/2004	24th Annual something
10213	WebClass A		3/20/2004	1st Annual Cardiology Symposium
10213	WebClass B		3/20/2004	1st Annual Cardiology Symposium
10213	WebClass C		3/20/2004	1st Annual Cardiology Symposium
10213	Lab		3/20/2004	1st Annual Cardiology Symposium
10213	Drive		3/20/2004	1st Annual Cardiology Symposium
102737	Man		4/20/2004	A New Event
102847	Man		7/02/2004	A New Event For the Day
102847	Man		7/02/2004	A New Event For the Day
102847	Man		7/02/2004	A New Event For the Day
102847	Man		7/02/2004	A New Event For the Day
102847	Man		7/02/2004	A New Event For the Day
10290	Man		8/4/2004	Cardiology Grand Rounds
10290	Man		8/11/2004	Cardiology Grand Rounds
10290	Man		8/18/2004	Cardiology Grand Rounds
10290	Man		8/25/2004	Cardiology Grand Rounds
10290	Man		9/1/2004	Cardiology Grand Rounds
10290	Man		9/8/2004	Cardiology Grand Rounds
10290	Man		9/15/2004	Cardiology Grand Rounds
10290	Man		9/22/2004	Cardiology Grand Rounds
10290	Man		9/29/2004	Cardiology Grand Rounds
10290	Man		10/6/2004	Cardiology Grand Rounds
10290	Man		10/13/2004	Cardiology Grand Rounds
10290	Man		10/20/2004	Cardiology Grand Rounds
10290	Man		10/27/2004	Cardiology Grand Rounds
10290	Man		11/3/2004	Cardiology Grand Rounds
10290	Man		11/10/2004	Cardiology Grand Rounds
10290	Man		11/17/2004	Cardiology Grand Rounds
10290	Man		11/24/2004	Cardiology Grand Rounds
10290	Man		12/1/2004	Cardiology Grand Rounds
10290	Man		12/8/2004	Cardiology Grand Rounds
10290	Man		12/15/2004	Cardiology Grand Rounds
10290	Man		12/22/2004	Cardiology Grand Rounds
10290	Man		12/29/2004	Cardiology Grand Rounds



Sorting and Selecting

Click on any column header title to sort the event listing by that column. For instance, if you wish to sort by Event Name, click on the Event Name header and all records will be sorted alphabetically by event name.



Click on the "Go" button in the Evt column for the Event you wish to select. This will move you to the Event General Tab and view this specific event's data.



You can speed search Events by doing the following: Click in the Event column. Pressing "Alt + first letter of the event name" will move to the first event that begins with that letter in the list.



Pressing "Ctrl + Z" (Locate) will popup the Explorer User Prompt. When you use this operator, you only need specify a part of what you want and the rest is "wild". For example, if you were to specify: ..Event.. you would be saying an event that begins with "something", has "E-v-e-n-t" somewhere within and ends with "something". You are not specifying what the "something" is. It can be any letters or numbers. So, the following Events would meet the criteria: 1st Annual Event, Event Symposium and Cardiology Event in Texas. Enter information and press OK. The first Event that meets your search criteria will be highlighted. Pressing "Ctrl + A" (Locate next) will go to the next record with that criteria. Continue to locate additional records by pressing Ctrl + A until your record is found.

Section 3: Events

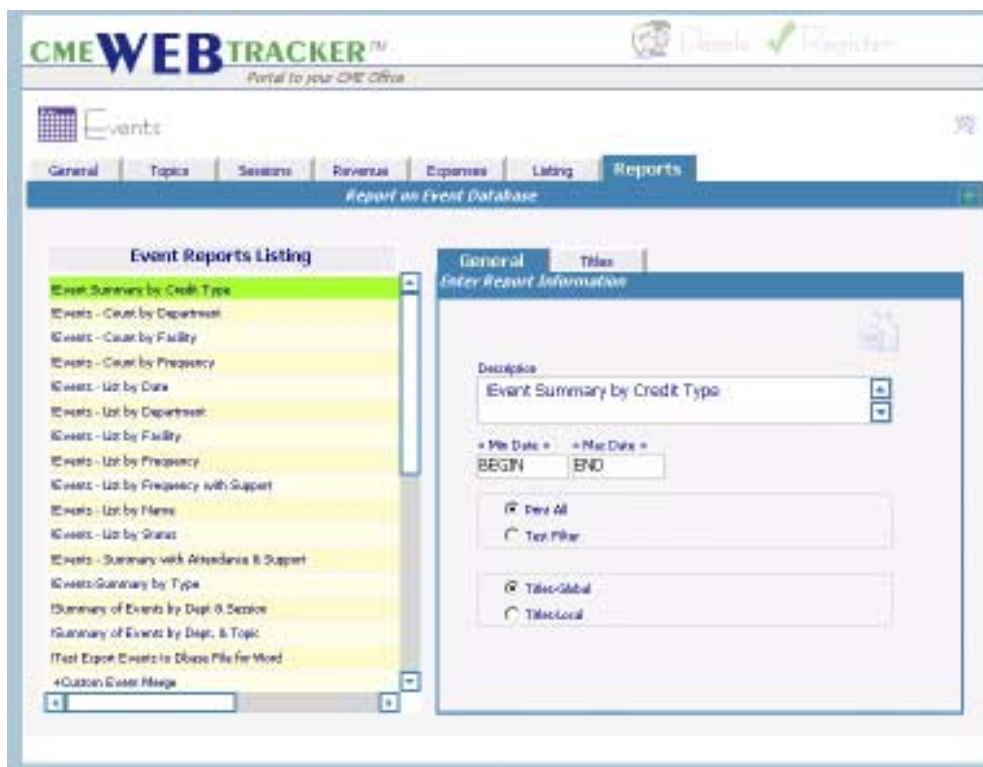
Planning and Entering Events

▶ Reports Tab



Printing new Reports

A complete Listing of Reports specific to the Events Area is located in the Reports Tab.



 Access a Report by clicking it to highlight. The Report will then be found in the description box on the right.

Section 3 Events

Report Listing

▶ Event Report Listing



The Report Screen

The report screen is split into an editing area at the right and a listing area at the left. Each report is defined by its description. You can change the description of any report on the right hand side and it will be alphabetically listed on the left hand side.

For each report you can choose to "Print All" or "Print Filter" (the filter name will be listed). If you print the filtered records, only those records that meet the filter criteria will be printed.

You may choose to use the "Global Titles" or the "Local Titles". The global titles are available to all users. The local titles are specific to each user account.



Defining Your Reports

DESCRIPTION: This is the name of the report. The reports in the CME WEB TRACKER Staff Edition were assigned titles as they were created. However, these names can be changed if there is another name or description that is more appropriate in your office. To do this, select the Report, and change the name in the Description box to the right. The report will be the same, but the name has been customized.

ORDER OF REPORTS: The order of the reports in the listing is alphabetical. To find the report needed, use the scroll bar to scroll through the list and view the names. The order can be changed if there are certain reports that you run most often, that would be more convenient to find at the top of the list.

CHANGING ORDER OF REPORTS: Place an A,B,C, etc in front of any report name, followed by a (> sign) to reassign the order of the reports. For example, if the "Mailing Labels" report is the one that you would like at the top of the list under reports, then change the name (as described above) to A>Mailing Labels. This places it at the top of the list. (The A> will not appear on the printed report.)



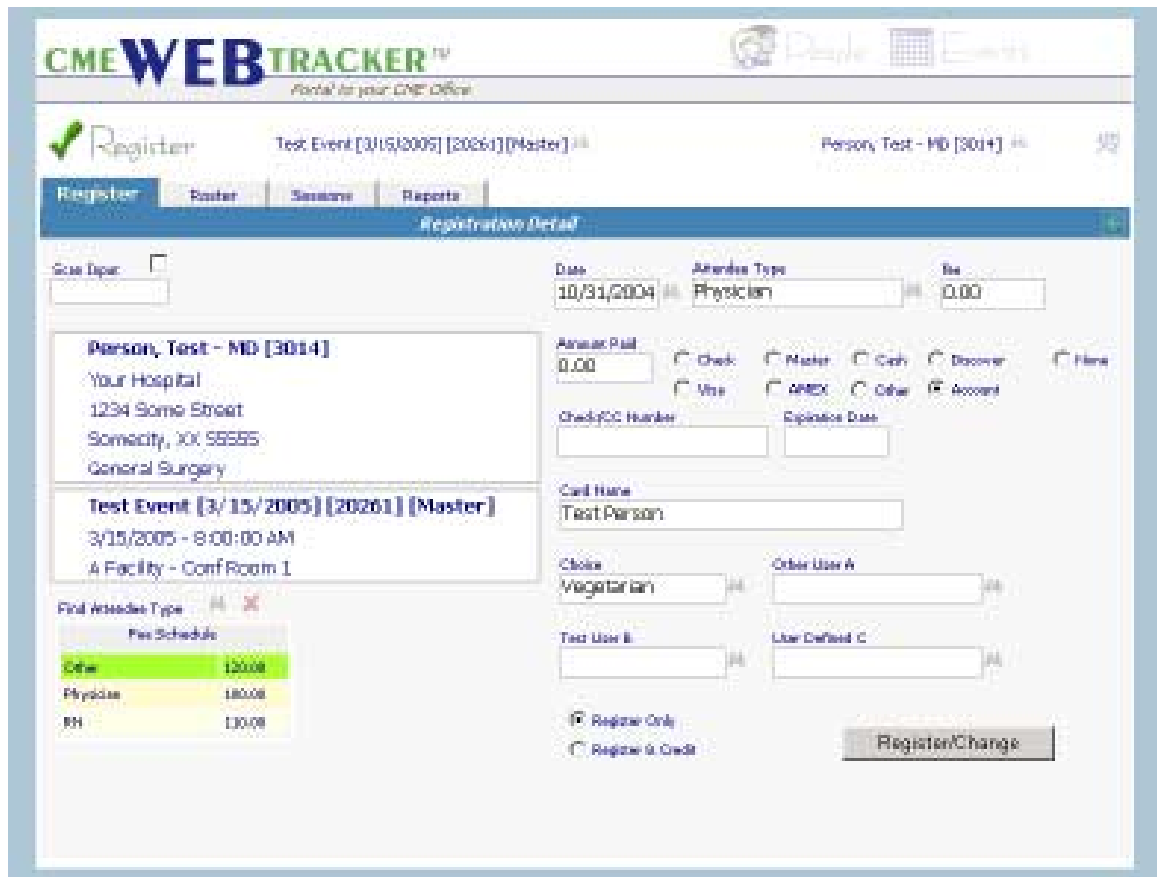
Report "Titles"

Use this area to define the "Global" or "Local" Titles for a report. There are multiple lines that can appear at the top of each "PDF" report as defined here.

Section 4  Register

This is the area where you will register and credit people for events.

- Register Tab
- Roster (for specific Event)
- Sessions
- Reports



Person: Test - MD [3014]
 Your Hospital
 1234 Some Street
 Somewhere, XX 55555
 General Surgery

Test Event [3/15/2005] [20261] [Master]
 3/15/2005 - 8:00:00 AM
 A Facility - Conf Room 1

Attendee Type	Fee
Other	120.00
Physician	180.00
RN	130.00

The Register Tab will be used to register people for events, to work with the completed rosters of each event and to issue credit to people for the events they attend.

 The box next to Scan Input should be "Checked" to turn on only when you are using a Barcode scanner.

Section 4:  Register

Register People for Events

▶ Register Tab



Entering Registrations

You may enter registrations and pre-registrations for events in the Register screen.

To add a registration, first find the **EVENT**, (either by Number or by Name) in the find Event window. Information pertaining to the event you choose in the FIND EVENT drop down will appear in the **EVENT INFORMATION** window in the lower left hand corner.

Next, go to the **FIND PERSON** window. Again, you may search by ID number or by name. Once you begin typing in the person's last name or id, a speed search will begin in the list below to assist you. Press enter to select the person. Information pertaining to that registrant will appear below in the **ATTENDEE INFORMATION** section at left.



If you note changes in the person's address or other information displayed in the Attendee Information section, Click the People graphic to move to the People area and change the record as needed. Once the changes are complete, Click the Register graphic to resume the registration.

Your cursor will move to the **DATE** field in the **REGISTRATION Detail** section. Press enter to accept today's date or type in the date of payment, select an attendee type (if you are using a fee schedule), With a fee schedule the amount will be entered automatically. Otherwise, you can type in the payment amount. Then click the appropriate payment type. If payment is made by credit card, type in the CREDIT CARD NUMBER, EXPIRATION DATE and NAME on the credit card, as required.

If you are populating the CHOICE, or USER DEFINED fields, you will make selections or type in those fields as well.

Click on the REGISTER BUTTON or press + on the numeric keypad to register this person. Once registered, the information boxes turn cyan in color and the word "Registered" appears in red above the Attendee Information section.

Click the ROSTER TAB in the registration area to view a list of attendees registered for this event.



You may wish to enter all People information prior to registration if many of the attendees are not yet in your database. Click the People graphic to move to the People area and add people that are not yet in the system.

Section 4 Register

Register People for Events

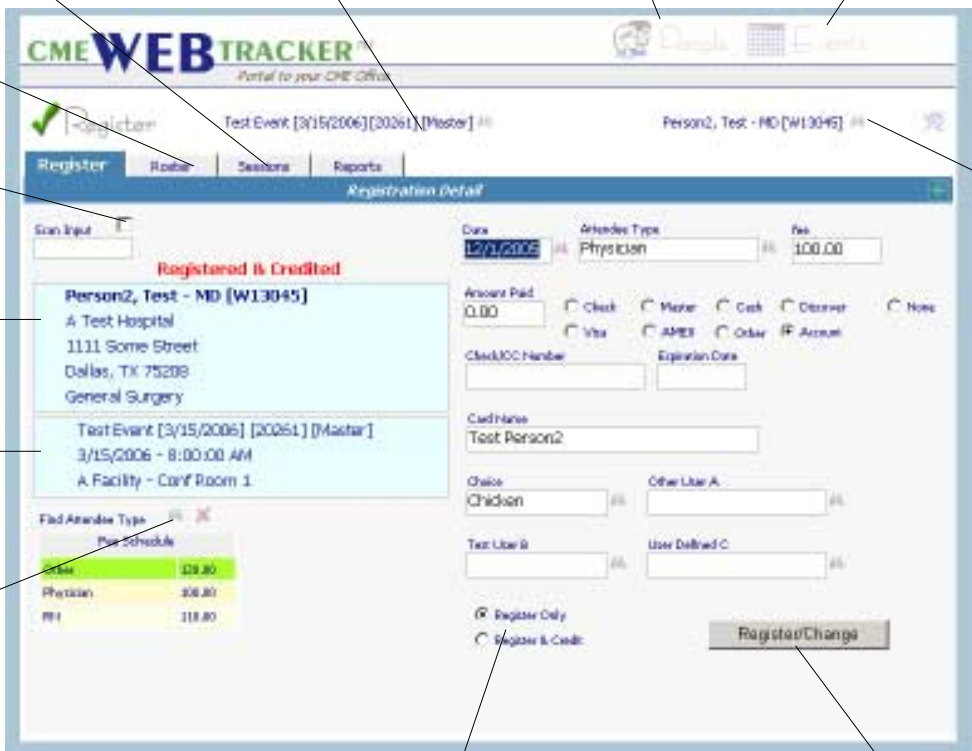
▶ Register Tab



Entering Registrations

The functions performed in the RegisterTab include:

- Locate a person to register for an event
- Locate an event if you wish to change events
- View active attendee information
- View active event information
- Assign Fees to the event registration
- Register a person for an event
- Change Registration (press Register/Change button to save changes)
- Credit a person while registering
- Use Bar Code Scanning to Register people



The screenshot shows the 'Register' tab in the CME WEB TRACKER application. The interface includes a navigation bar with 'Register', 'Roster', 'Sessions', and 'Reports'. The main content area is titled 'Registration Detail' and contains several sections:

- Attendee Information Area:** Displays details for 'Person2, Test - MD (W13045)', including address (1111 Some Street, Dallas, TX 75208) and specialty (General Surgery).
- Event Information Area:** Displays details for 'Test Event [3/15/2006] [20261] [Master]', including date (3/15/2006 - 8:00:00 AM) and location (A Facility - Conf Room 1).
- Fee Schedule:** A table showing fees for different attendee types:

Find Attendee Type	Fee
Physician	100.00
Physician	200.00
MD	110.00
- Registration Form:** Includes fields for Date (3/15/2006), Attendee Type (Physician), Fee (100.00), Amount Paid (0.00), and various payment method options (Check, MasterCard, Cash, Discover, Visa, AMEX, Other, Account). It also has fields for Card Name (Test Person2), Gender (Chickon), and other user identifiers.
- Registration Options:** Radio buttons for 'Register Only' and 'Register & Credit', with a 'Registered/Change' button.

Callouts from the surrounding text point to the following features in the screenshot:

- Access Roster
- Click for Bar Code Scanning
- Attendee Information Area
- Event Information Area
- Build Fee Schedule for this Event
- Access Session Registration
- Find Event
- Move to People Area
- Move to Events Area
- Find Person
- Register with/without Credit
- Click to Register or Change existing registration

Section 4: Register

Register People for Events

▶ Roster Tab

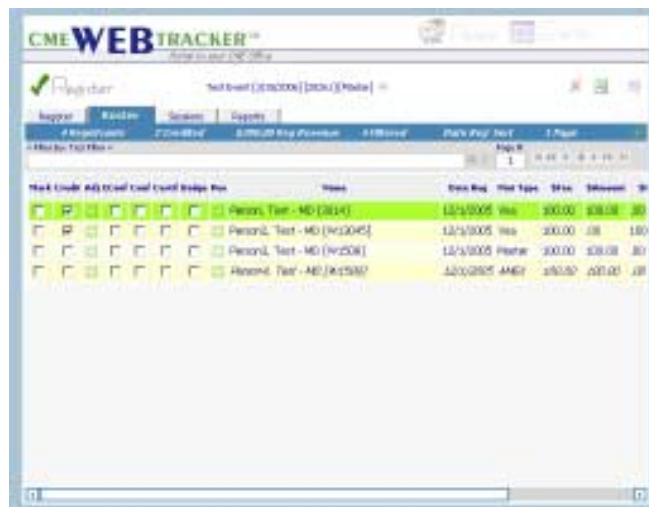


Register Roster for each Event

The Registration Roster is a list screen with a number of additional features to make your job of registering attendees more effective.

You may use this screen for viewing attendees and for selecting specific attendees for printing reports. You may also use this area to issue CREDIT if the registrants were pre-registered. The number of registrants is displayed at the top of the screen, with total credited, registration revenue and # filtered.

You may use the horizontal scroll bar to view additional columns to the right.



Mark	Credit	Adj	Event	Cost	Event	Bridge	Post	Name	Date Rec	Post Type	Price	Selection
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Person, Test - MD (1614)	12/1/2005	Web	100.00	100.00 20
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<i>Person, Test - MD (162045)</i>	<i>12/1/2005</i>	<i>Web</i>	<i>100.00</i>	<i>100.00 180</i>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Person, Test - MD (162508)	12/1/2005	Phone	100.00	100.00 20
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Person, Test - MD (161580)	12/1/2005	AMEI	100.00	100.00 10



Note that most attendee records are in standard type, but Test Person4 is listed in italics. This indicates that the person is not eligible for the event type(s) of credit offered.



You can speed search names by doing the following: Click in the Name column. Pressing "Alt + first letter of last name" will move to the first person who's last name begins with that letter in the list.



Pressing "Ctrl + Z" (Locate) will popup the Explorer User Prompt. When you use this operator, you only need specify a part of what you want and the rest is "wild". For example, if you were to specify: ..John.. you would be saying a name that begins with "something", has "J-o-h-n" somewhere within and ends with "something". You are not specifying what the "something" is. It can be any letters or numbers. So, the following names would meet the criteria: Johnson, Adams-Johnson and TiJohn. Enter information and press OK. The first name that meets your search criteria will be highlighted. Pressing "Ctrl + A" (Locate next) will go to the next record with that criteria. Continue to locate additional records by pressing Ctrl + A until your record is found.

Section 4  Register

Register People for Events

▶ Roster Tab

**Register Roster for each Event (Cont.)**

Filter: The filters can be used in the roster as described in the "Filters" area of this guide. If you wish to filter a group by criteria, you can then print the filtered records or export the filtered records.

MARK: Marking can be used in conjunction with the filters. If you don't have common criteria, but have random people you'd like to "filter", you can mark the people individually. Marked records will be checked off in the marked column and displayed in red. If you choose to filter records where "{Mark}True", only the marked records will be displayed.

CREDIT: To issue credit to an individual, click on the CREDIT check box in the row for that person. To take credit away, click to take the check mark away.

ADJ: To see the credit displayed in the PEOPLE area for a particular person, you may click on the "Go" button in the Adj column to move to the People..Credits area for that person.


Econf, Conf, Certif & Badge: This group of columns can be marked individually or by filter action to specify a person who has been issued any of these documents.

All remaining columns are data columns. The **Register Roster** may be sorted by any data column by clicking the header for that column.


The **Tab Bar** displays the active filter and the sort order.

Use the **Page Navigator** to browse through multiple pages of a roster.

**Delete a Registrant**

To delete, highlight the registrant and click the  icon in the upper right hand area. You will be asked to confirm deletion.

**Roster Spreadsheet**

To export the current register roster to a spreadsheet, click the Excel icon  in the upper right hand area. A spreadsheet with all registrants or filtered registrants will be displayed in the order that the roster is sorted.

Section 4  Register

Register People for Events

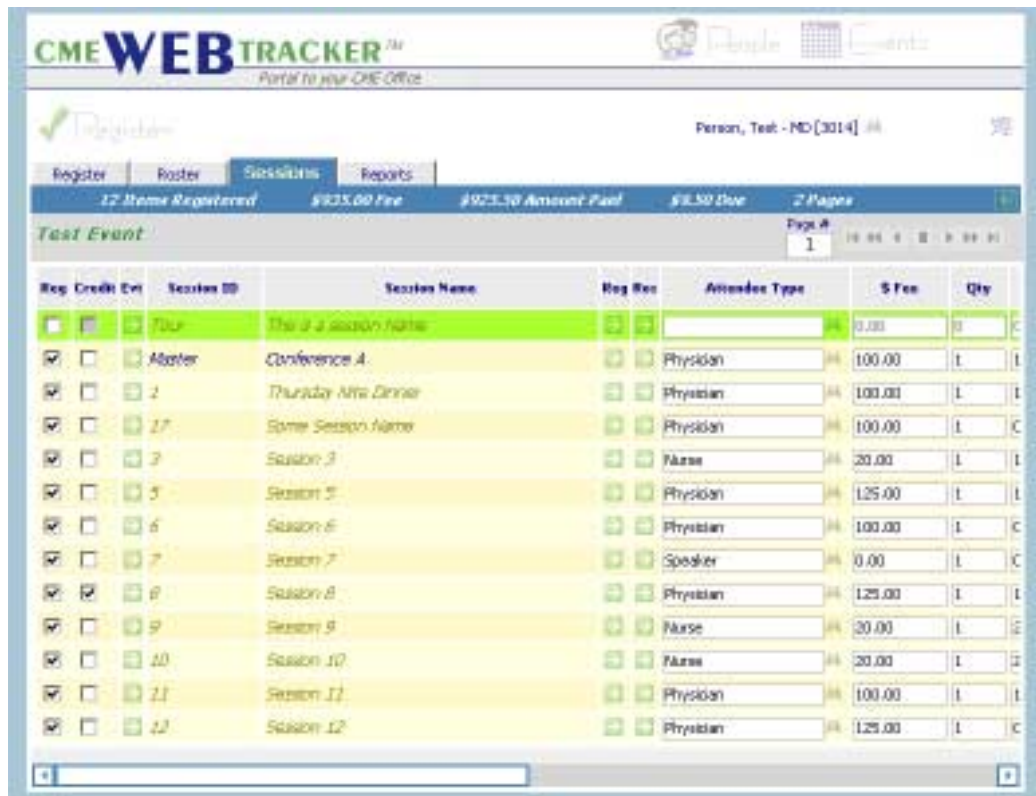
▶ Sessions Tab

▲ **Session Registration**



The Sessions Tab in the Register area is where you will register people for various sessions of an event. A session might be a workshop, a special activity, or even a product that can be purchased at the event.

A person can be registered in the Register Tab and then the sessions indicated in the Register Sessions Tab. Or, a complete registration can be input here.

Click the checkbox in the Reg column to register the active person (shown above) for the session. Select an attendee type for the associated fee, accept or change the Qty, accept or change the Amount Paid. The Registration Date will automatically be "today". If the person was registered for the "Master" event through the Register Registration screen, all credit card information will be copied automatically to each session record with payment involved.



Reg	Credit	Qty	Session ID	Session Name	Reg Rec	Attendee Type	\$ Fee	Qty
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	70ur	This is a session name	<input type="checkbox"/>		0.00	0
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Abster	Conference A	<input type="checkbox"/>	Physician	100.00	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2	Thursday Aftn Dinner	<input type="checkbox"/>	Physician	100.00	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	27	Some Session Name	<input type="checkbox"/>	Physician	100.00	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3	Session 3	<input type="checkbox"/>	Nurse	20.00	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	Session 5	<input type="checkbox"/>	Physician	125.00	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6	Session 6	<input type="checkbox"/>	Physician	100.00	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7	Session 7	<input type="checkbox"/>	Speaker	0.00	1
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8	Session 8	<input type="checkbox"/>	Physician	125.00	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9	Session 9	<input type="checkbox"/>	Nurse	20.00	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10	Session 10	<input type="checkbox"/>	Nurse	20.00	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11	Session 11	<input type="checkbox"/>	Physician	100.00	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12	Session 12	<input type="checkbox"/>	Physician	125.00	1

 If you click any of the "Find" binoculars  to make a selection and get a "Restricted" popup, this means that the person is not yet registered for the session. Click the Reg checkbox to register the person and try again.

Section 4: Register

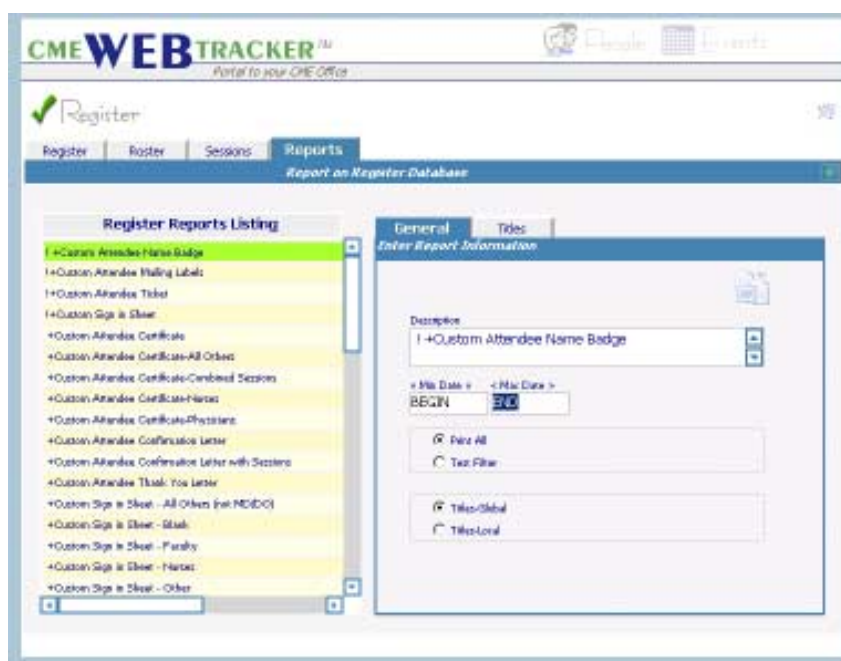
Register People for Events

▶ Reports Tab



Printing Reports

A complete Listing of Reports Specific to the Register area is Located in the Reports Tab.



Access a Report by clicking it to highlight. The Report will then be listed in the description box on the right.

Section 4:  Register

Report Listing

▶ Register Report Listing



The Report Screen

The report screen is split into an editing area at the right and a listing area at the left.

Each report is defined by its description. You can change the description of any report on the right hand side and it will be alphabetically listed on the left hand side.

For each report you can choose to "Print All" or "Print Filter" (the filter name will be listed). If you print the filtered records, only those records that meet the filter criteria will be printed.

You may choose to use the "Global Titles" or the "Local Titles". The global titles are available to all users. The local titles are specific to each user account.



Defining Your Reports

DESCRIPTION: This is the name of the report. The reports in the CME WEB TRACKER Staff Edition were assigned titles as they were created. However, these names can be changed if there is another name or description that is more appropriate in your office. To do this, select the Report, and change the name in the Description box to the right. The report will be the same, but the name has been customized.

ORDER OF REPORTS: The order of the reports in the listing is alphabetical. To find the report needed, use the scroll bar to scroll through the list and view the names. The order can be changed if there are certain reports that you run most often, that would be more convenient to find at the top of the list.

CHANGING ORDER OF REPORTS: Place an A,B,C, etc in front of any report name, followed by a (> sign) to reassign the order of the reports. For example, if the "Registration Recap" report is the one that you would like at the top of the list under reports, then change the name (as described above) to A>Registration Recap. This places it at the top of the list. (The A> will not appear on the printed report.)



Report "Titles"

Use this area to define the "Global" or "Local" Titles for a report. There are multiple lines that can appear at the top of each "PDF" report as defined here.

Section 5: Printing Report

Report Listing

▶ How to Print Reports

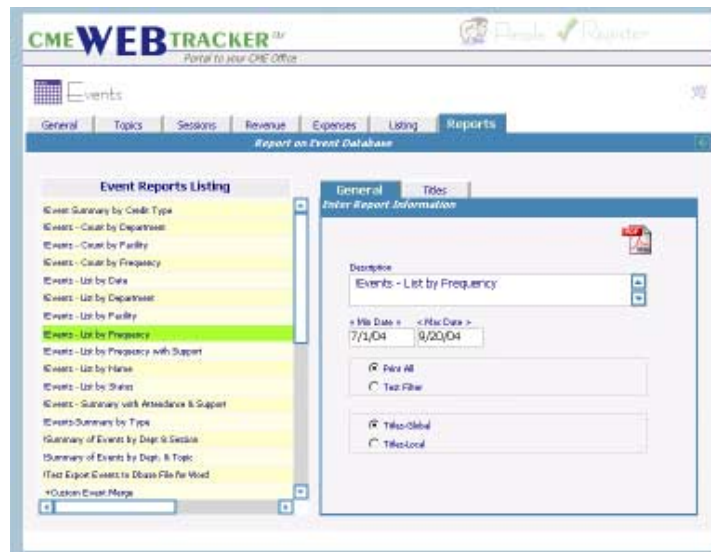


PDF Reports

There are Report Tabs in each of the 3 major areas of the CME Web Tracker Staff Edition. Each contains reports that relate to that area.

In each Report Tab there are 2 basic types of reports:

These reports are listings and other static reports that are displayed on your screen in a PDF (Adobe Acrobat Reader) file.



When you highlight a PDF report and click on the PDF icon on the right side, you should see the Processing Report... dialog box.



Once processing is complete, your browser should display the Adobe Acrobat file. From this window you can save or print the report.



If the Green Processing Report bar does not popup when you click to print a Report, please contact our customer service. You can E-mail us at support@cmetracker.com or call us at (214)943-4942.

Section 5: Printing Reports

Report Listing

▶ How to Print Reports



Word "Merge" Reports

These reports are constructed of 2 parts. The first is the data source that will be downloaded and SAVED to your c:\My Documents folder. The second is a generic merge document that you may or may not choose to download.



If you already have a custom merge document that relates to the data source you have downloaded, you can skip the download of the merge document.

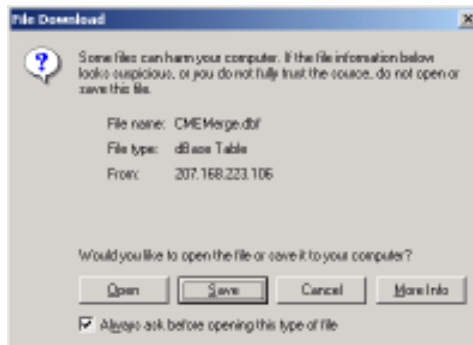
Click to highlight the report you wish to print. Click the Process icon



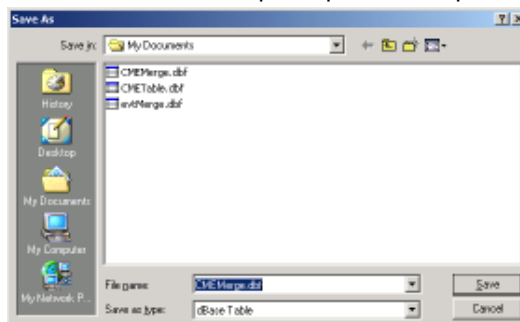
The process dialog will be displayed:



The next dialog prompts you to SAVE the file. Click SAVE.



The next dialog prompts you to browse for the folder. Locate C:\MY DOCUMENTS on your system and then click Save. If prompted to replace the file, click YES.



Section 5: Printing Reports

Report Listing

▶ How to Print Reports



Word "Merge" Reports (continued)

Once you have saved the data source file to your C:\My Documents folder, you will be back at the report listing screen.

If you wish to download a new copy of the generic Word merge document, Click the Word icon.



At this point the Word merge document should open on your screen. You can MERGE the document for printing, or SAVE the document for editing and merging.

It is advisable to have a document filing system for your Word merge documents. Once you have customized a version of the document, you will want to open the version that is saved on your local system.