

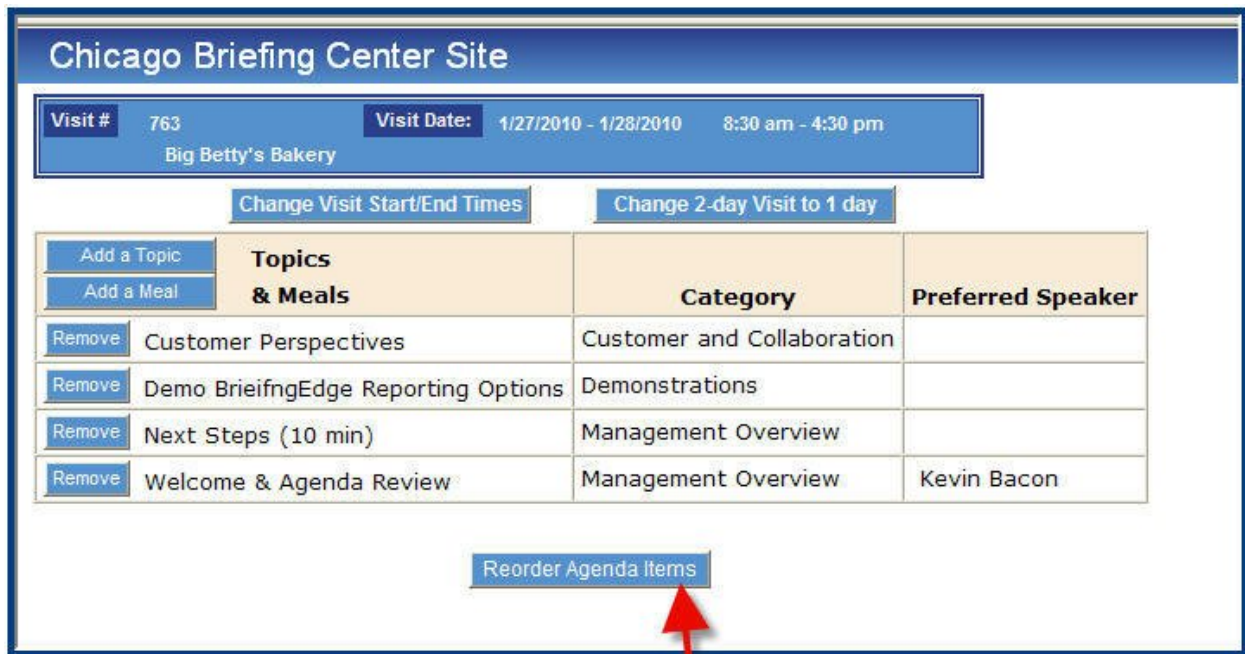
Subject: BriefingEdge Version 13.1 New Features

Agenda Topic Re-Ordering – Why would you use it?

You would use this function when the order of the topics selected and displayed on the screen, is not the order in which they should be presented. In selecting topics, **BriefingEdge** simply adds agenda items *sequentially* as they are selected by the Requester. This often causes a different placement than the one you want for the final agenda. For example, in the sample below, the “Welcome” topic was not selected until all the others were established.

A built-in re-ordering function is now available in **BriefingEdge** for visits still in tentative status, meaning it can be used by the originating Requester (or by a coordinator). As always, the coordinator can still alter the starting or ending times of an agenda item to change the order, but this new drag and drop method is easier and faster.

You can begin the re-ordering process by clicking on the “Reorder Agenda Items” button on the “Topics and Meals” screen as shown by the arrow below:



Chicago Briefing Center Site

Visit # 763 Visit Date: 1/27/2010 - 1/28/2010 8:30 am - 4:30 pm
Big Betty's Bakery

Change Visit Start/End Times Change 2-day Visit to 1 day

	Topics & Meals	Category	Preferred Speaker
Remove	Customer Perspectives	Customer and Collaboration	
Remove	Demo BriefingEdge Reporting Options	Demonstrations	
Remove	Next Steps (10 min)	Management Overview	
Remove	Welcome & Agenda Review	Management Overview	Kevin Bacon

[Reorder Agenda Items](#)

A new screen will appear with the currently selected topics shown in the order order in which they were selected.

Arrange the agenda items by dragging and dropping them into the preferred order.



Customer Perspectives - Customer and Collaboration

Demo BriefingEdge Reporting Options - Demonstrations

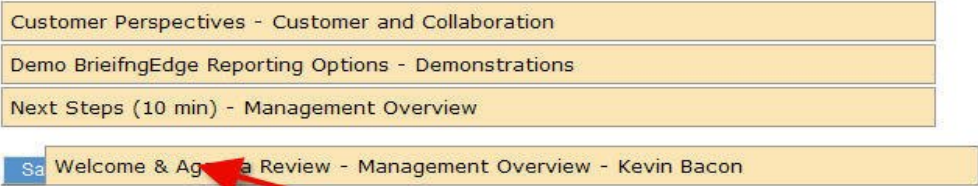
Next Steps (10 min) - Management Overview

Welcome & Agenda Review - Management Overview - Kevin Bacon

Save the New Agenda Order Return to Visit

Place your mouse icon over the agenda item you wish to move (arrow below), click your LEFT mouse button, and HOLD IT DOWN.... Notice how the agenda item will “pop-out” of the sequence of topics and follow your mouse movements.....

Arrange the agenda items by dragging and dropping them into the preferred order.



Customer Perspectives - Customer and Collaboration

Demo BriefingEdge Reporting Options - Demonstrations

Next Steps (10 min) - Management Overview

Save Welcome & Agenda Review - Management Overview - Kevin Bacon

As you move the selected agenda item up and down, look for the small BLACK arrow-head “place-marker”. This shows you where the moved agenda item will be placed. In our example below, the arrow-head shows that it will be moved into the first time slot, in front of the “Customer Perspective” topic.



Customer Perspectives - Customer and Collaboration

Welcome & Agenda Review - Management Overview - Kevin Bacon

Demo BriefingEdge Reporting Options - Demonstrations

Next Steps (10 min) - Management Overview

Save the New Agenda Order Return to Visit

Now, simply release the LEFT mouse button, and the topic will appear where you placed it. This is called “DRAG and DROP” (for obvious reasons).



You must remember to save your re-ordering sequence by clicking on the “SAVE” button BEFORE returning to the visit (arrow above).

Of course, once the visit has been “Confirmed”, you can re-order the agenda items by changing each topic’s starting time, and **BriefingEdge** will resequence them for you based on the start time.