

New Scheduling Parameters and Rules

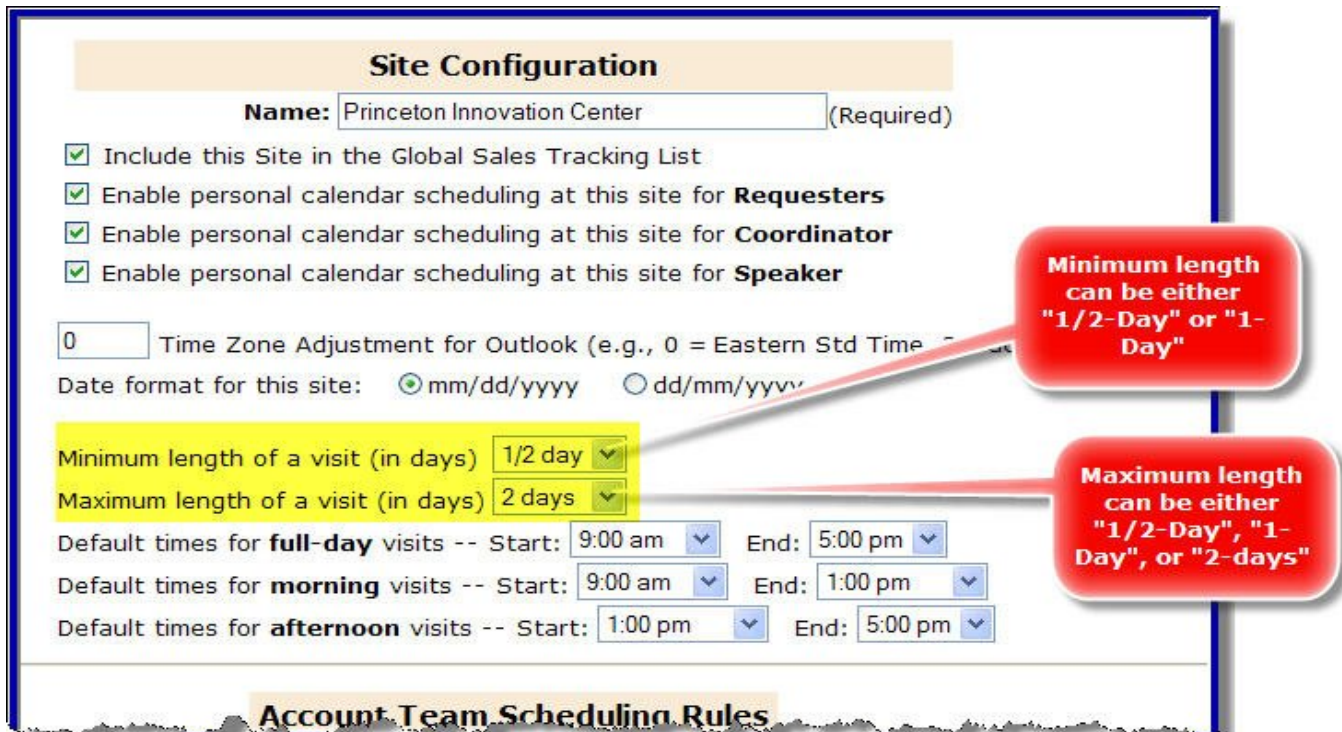
Minimum and Maximum Visit Length - Why would you use this feature?

Now **BriefingEdge** allows you to define the minimum or maximum length for visits on a site-by-site basis. These new parameters were designed to enforce visit length requests, restricting visits if they are not at least one day long or preventing the initial request to be longer than one day or even longer than ½ day. This was the thinking behind the latest site administration parameters.

For example, suppose you've designated that one of your briefing centers is to be used primarily for international visits. Because of the travel times frequently involved with international visits, you might want to restrict the minimum length of a visit to this briefing center, to 1-day.

Likewise, for smaller, regional sites where volume is more important and travel time is less so, you might want to set the maximum length of a briefing to 1 day or maybe even ½ day.

To define these parameters, go to the Site Administration screen and set the minimum / maximum values for this particular site as shown below.



Site Configuration

Name: (Required)

- Include this Site in the Global Sales Tracking List
- Enable personal calendar scheduling at this site for **Requesters**
- Enable personal calendar scheduling at this site for **Coordinator**
- Enable personal calendar scheduling at this site for **Speaker**

Time Zone Adjustment for Outlook (e.g., 0 = Eastern Std Time)

Date format for this site: mm/dd/yyyy dd/mm/yyyy

Minimum length of a visit (in days)

Maximum length of a visit (in days)

Default times for **full-day** visits -- Start: End:

Default times for **morning** visits -- Start: End:

Default times for **afternoon** visits -- Start: End:

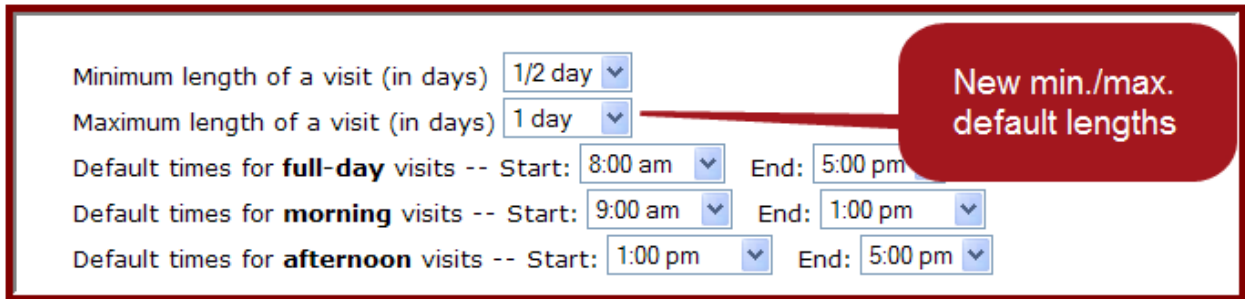
Account Team Scheduling Rules

Minimum length can be either "1/2-Day" or "1-Day"

Maximum length can be either "1/2-Day", "1-Day", or "2-days"

Adjusting Minimum and Maximum Days – What else does it affect?

As an administrator, you can change these default values at any time. Where it shows up however, is when a new request is initially entered. In the example below, an administrator decided to change the Princeton Site to allow ½ day or 1 day visit **requests**. (Notice we used the term requests. Any coordinator or administrator can expand or shrink a particular visit no matter what defaults are initially assigned.)



Minimum length of a visit (in days)

Maximum length of a visit (in days)

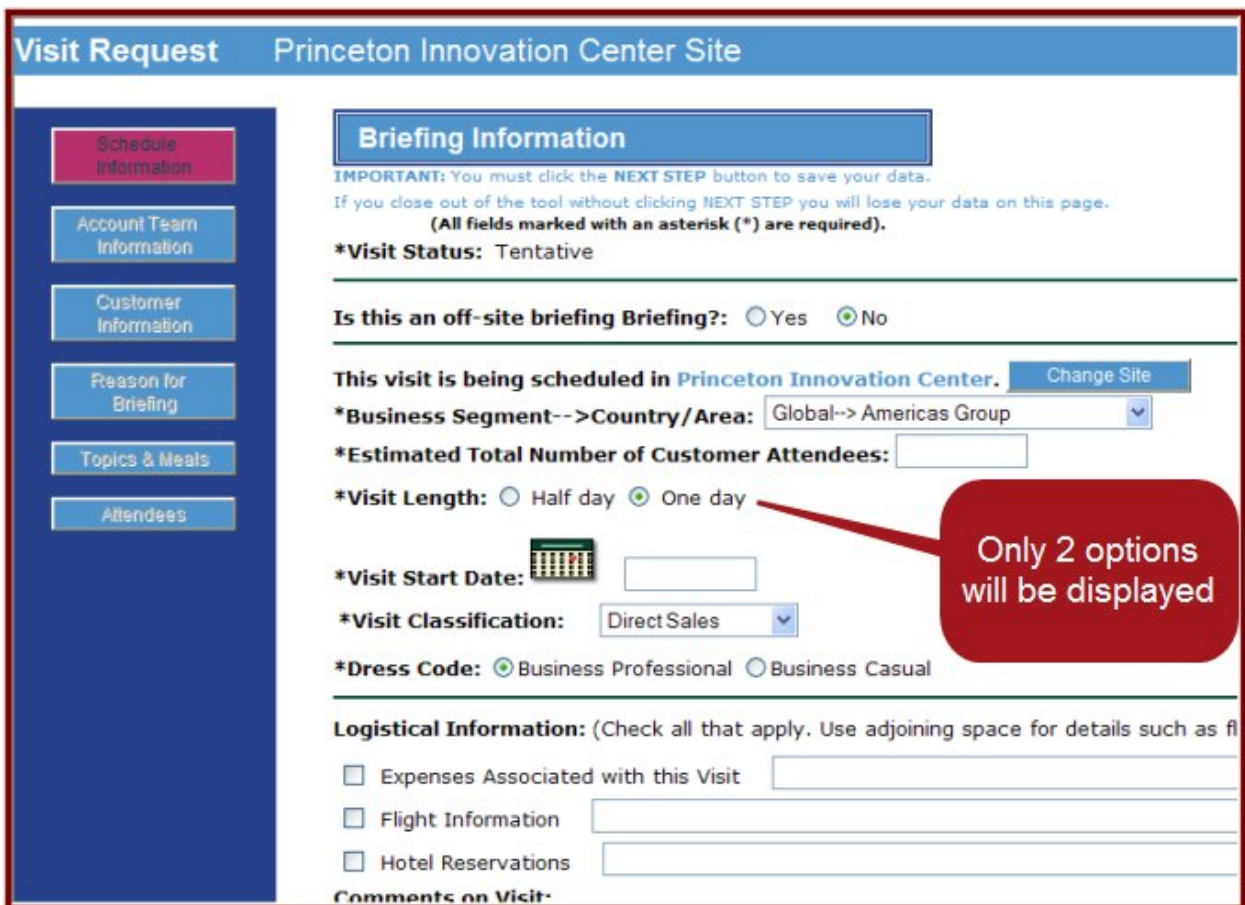
Default times for **full-day** visits -- Start: End:

Default times for **morning** visits -- Start: End:

Default times for **afternoon** visits -- Start: End:

New min./max. default lengths

Now, when initially scheduling a briefing in Princeton, notice that there are only two options for visit length.



Visit Request Princeton Innovation Center Site

Briefing Information

IMPORTANT: You must click the **NEXT STEP** button to save your data. If you close out of the tool without clicking **NEXT STEP** you will lose your data on this page. (All fields marked with an asterisk (*) are required).

***Visit Status:** Tentative

Is this an off-site briefing Briefing?: Yes No

This visit is being scheduled in Princeton Innovation Center. [Change Site](#)

***Business Segment-->Country/Area:** Global-> Americas Group

***Estimated Total Number of Customer Attendees:**

***Visit Length:** Half day One day

***Visit Start Date:**

***Visit Classification:** Direct Sales

***Dress Code:** Business Professional Business Casual

Logistical Information: (Check all that apply. Use adjoining space for details such as fl

Expenses Associated with this Visit

Flight Information

Hotel Reservations

Comments on Visit:

Only 2 options will be displayed

New Default Visit Starting/Ending Times - Why would you use this feature?

One of our goals in **BriefingEdge** has been to build features allowing you to schedule visits in a way that best matches how you operate your briefing centers. When a new briefing request is made, **BriefingEdge** presents you with available days that are based on your business rules (how many visits per day, how far in advance, etc.) and allocates a block of time based on the requested length of the visit (see discussion about visit length above).

Prior versions of **BriefingEdge** started all full day visits at 9:00 am and ended them (by default) at 5:00 pm. Many briefing programs routinely adjust their visit starting or ending times adding to the work that must be performed on each visit. This new parameter lets you set the default starting and ending times, on a site-by-site basis, so that it better matches the length of a typical briefing for each of your briefing centers. Like many other features we've discussed, this feature is simply a default that can be changed whenever you need to on an individual visit basis.

Approximately a third of the way down your screen, just beneath the "Minimum and Maximum" Days' variables (see above discussion), you will see three lines that start with the words "**Default times for....**". Each line will have two drop-down windows: One for the **Start:** time and one for the **End:** time (synonymous with "opening" and "closing" times).

The screenshot shows a configuration screen with the following settings:

- Minimum length of a visit (in days): 1/2 day
- Maximum length of a visit (in days): 1 day
- Default times for **full-day** visits -- Start: 8:00 am, End: 5:00 pm
- Default times for **morning** visits -- Start: 8:00 am, End: 12:00 noon
- Default times for **afternoon** visits -- Start: 1:00 pm, End: 5:00 pm

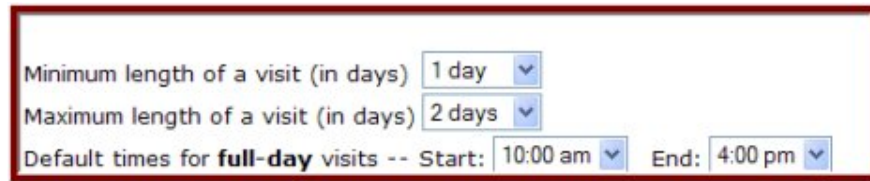
A red callout box on the right contains the text: "We've changed the default starting and ending times for all visit lengths". Red arrows point from this box to the 'End' dropdowns for the full-day, morning, and afternoon visit types.

Now, instead of a new, full-day briefing starting at 9:00 am and ending at 5:00 pm, all requests will initially start at 8:00 am and end at 5:00 pm. We have also changed the default starting times for morning and afternoon visits. We've allocated four hours for each but have provided a break of one hour between the morning and afternoon visits giving you time between customers.

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Now, suppose you want your site to support full-day briefings only and a typical briefing started at 10:00 and lasted until 4:00 pm.

You would make changes to the same site configuration screen but now you would define that the minimum length of a briefing is 1 day and the maximum is 2-days. Next, you would define for full day visits, the starting and ending times appropriately, as shown below.



The screenshot shows a configuration interface for full-day visits. It includes three dropdown menus: 'Minimum length of a visit (in days)' set to '1 day', 'Maximum length of a visit (in days)' set to '2 days', and 'Default times for full-day visits -- Start: 10:00 am' and 'End: 4:00 pm'.

New Default Visit Starting/Ending Times – What else does it affect?

It affects your agenda. When you designate topics, the first topic specified always begins at the visit “start time”. If you have specified a default and haven’t overridden it, then the first agenda item will start at the default visit start time.

In the same vein, it will affect all invitations you send, adjusting itself accordingly for your speakers, both local and out of your briefing center’s time zone. Remember, each topic for an agenda item has a duration and as topics are added, **BriefingEdge** calculates how long that topic should take (by default). You can override the starting and ending times for any topics.