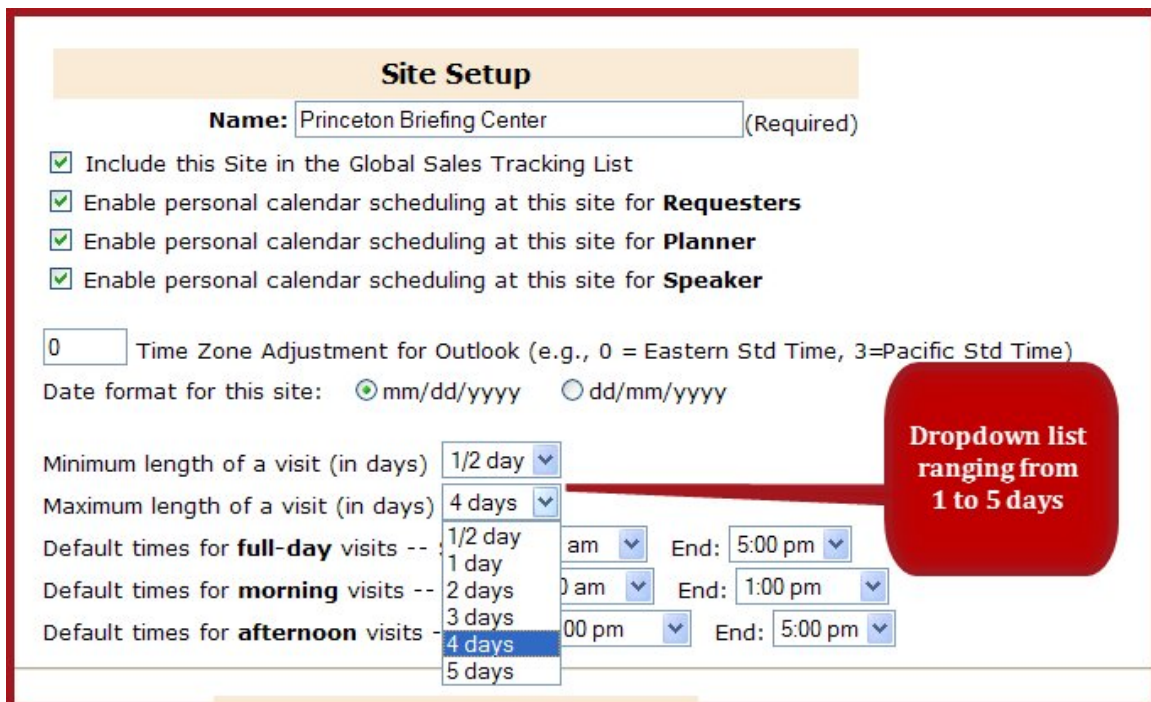


Extended Length Visits – Why would I use it?

The newest scheduling feature in **BriefingEdge** let's you configure a site to allow visits ranging from 1 day up to 5 days. As briefing programs become more sophisticated and respond to a more global perspective, there are times when visits spanning more than 2 days are required. This new feature gives administrators the ability to designate the maximum length of a briefing to range from 1 to 5 days. Extended length visits also include additional flexibility related to topic selection and being able to adjust the starting time or ending time for a multiday visit.

Extended Length Visits – Defining maximums for your site

Start by going to the **Site Configuration** screen for the specific site in which you want to allow extended length visits and select the maximum length from the dropdown.



Site Setup

Name: Princeton Briefing Center (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 **Planner**
- Enable personal calendar scheduling at this site for **Speaker**

0 Time Zone Adjustment for Outlook (e.g., 0 = Eastern Std Time, 3=Pacific Std Time)

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

Minimum length of a visit (in days) 1/2 day

Maximum length of a visit (in days) 4 days

Default times for **full-day** visits -- 1/2 day am End: 5:00 pm

Default times for **morning** visits -- 2 days 0 am End: 1:00 pm

Default times for **afternoon** visits -- 3 days 00 pm End: 5:00 pm

4 days

5 days

Dropdown list ranging from 1 to 5 days

Press UPDATE and you've now enabled extended length briefings. *{Special Note: Extended length visits are currently restricted to briefings. This feature is being extended to events and is currently under development}*

Now, you'll notice some additional options when scheduling a visit. You can now request a visit up to 4 days long (because 4 is the maximum length of visit we've defined in this site).

Visit Request Princeton Briefing Center Site Cancel This Request Next Step

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).

Type of Visit: Customer Briefing

*Visit Status: Tentative

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

This visit is being scheduled in **Princeton Briefing Center.** Change Site

*Market Segment-->Region: Global-> Americas Group

*Estimated Total Number of Customer Attendees:

*Visit Length: Half-day 1-day 2-day 3-day 4-day

*Visit Start Date: *The Visit start and end times can be adjusted later, via the Topics screen.*

Alternate Visit Date:

*Line of Business: Direct Sales

*Dress Code: Business Professional Business Casual

The new screen that displays when you click on the calendar icon lets you select whether the visit should start in the morning or in the afternoon on the first day, and whether it should end at the end of the business day or end in the morning on the last day.

Setting First and Last Day for a Multi-day Visit

You are requesting a 3-day visit.
So that we can accurately check day and room availability, please indicate whether the first and last day of the visit will be full days or half days:

FIRST day of the visit will be a Full Day.
 FIRST day of the visit will start in the Afternoon (1pm or later).

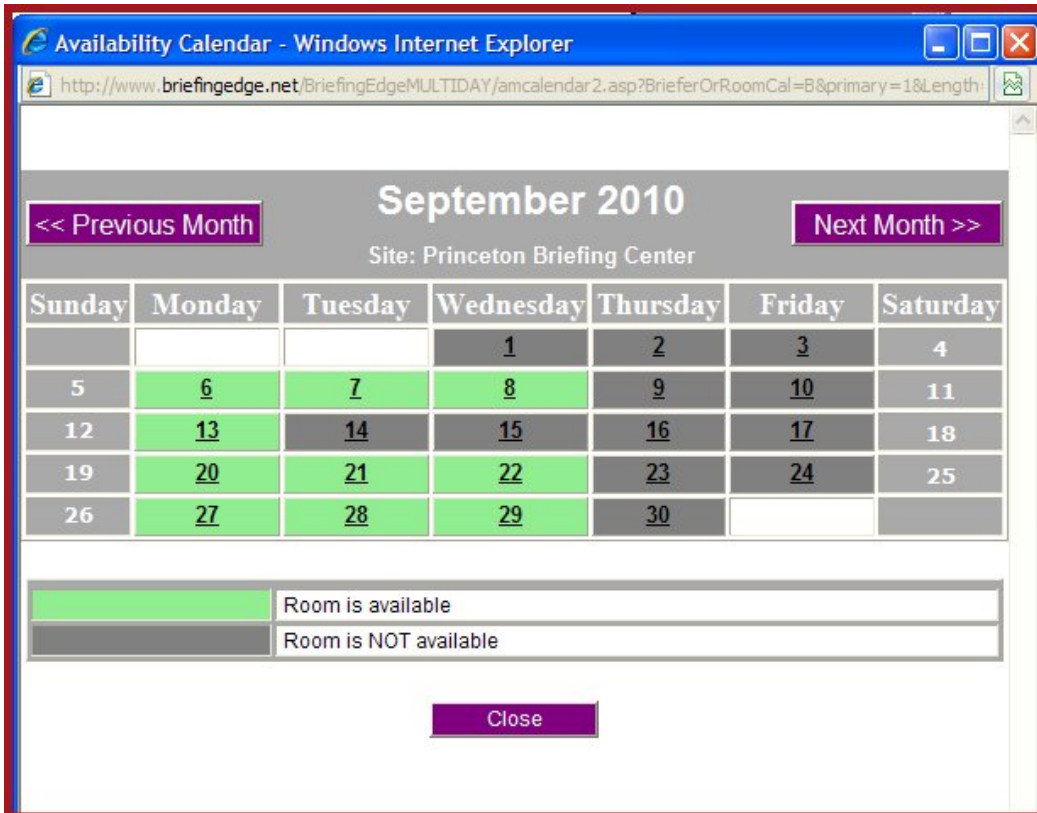
LAST day of the visit will be a Full Day.
 LAST day of the visit will be Morning Only.

Cancel View the Availability Calendar

There is now a new option for a multiday visit allowing you to start that visit in the morning or the afternoon and allowing it to end at the end of the day or when the morning is over.

In the above example, I'm scheduling a 3 day visit that will really run for 2 ½ days since it will start in the morning on the first day and will end after the morning session on the last day.

After you've selected the radio buttons indicating when the visit is to start and end, **BriefingEdge** will display the monthly calendar allowing you to select your visit date.



You should notice a few things about this new calendar. For example, since I'm scheduling a 3-day visit, **no dates are available for selection on either Thursday or Friday**. That's because in order to schedule a 3-day visit within the work week, the visit has to start on a Monday, Tuesday or Wednesday. No visit can include a weekend nor can it span weekends (meaning it cannot start on a Friday and end the following Tuesday).

Select the date on which you want the visit to **start**. A 3-day visit starting on 9/28 means that **BriefingEdge** will find three main rooms available, starting on 9/28, that can hold the number of attendees you specified.

Reminder: Wondering why you can't book a visit on a certain day? Take advantage of the mouse-over feature on the calendar to see the explanation of why a grayed-out date is not available.

Extended Length Visits – Detailed scheduling rules and warnings

There are now some new scheduling rules put into place. In order to show a date as available, **BriefingEdge** must find a default booking room that can accommodate the estimated number of attendees. It will look first for the same room to be used for all days of the visit. But if it can't find the same room, it will use other default booking rooms so that the visit can be scheduled. This is important since it means you may have to juggle rooms manually or your customer may have to switch rooms from one day to the next.

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

*Market Segment-->Region: Global->Americas Group

*Estimated Total Number of Customer Attendees: 6

*Visit Length: Half-day 1-day 2-day 3-day 4-day

*Visit Start Date: 9/28/2010 First Day start: 8:00 am - Last Day end: 1:00 pm *The Visit starts*

Alternate Visit Date:

*Line of Business: Direct Sales

*Dress Code: Business Professional Business Casual

Notice that we didn't select an alternate date. If your briefing program uses alternate dates you may want to think about having that option turned off since **BriefingEdge** holds those rooms while the visit is still tentative. That means, in our example above, that if we had picked an alternate date, **BriefingEdge would actually hold 6 dates on the calendar** (3 for the primary and 3 for the alternate date) until the visit is confirmed. The default booking rooms for the alternate dates are also put on hold, which means for a 5 day visit, you'll be reserving default booking rooms for 5 days for the primary date and 5 days for the alternate date.

Let **BriefingEdge** customer service know if you want alternate dates removed from your web site.

Extended Length Visits – New topics and meal selection flexibility

There is new flexibility when entering topics and meals, even during the initial scheduling process. You can specify on which day a topic should be presented and you can also drag and drop topics from day to day. Here's what the topics and meal screen looks like for a 3-day visit.

Topics

Do not use your Browser's Back or Forward keys. Use the BriefingEdge buttons to navigate.

<div style="background-color: #6a3d9a; color: white; padding: 2px; font-size: x-small;">Add a Topic to Day 1</div> <div style="background-color: #6a3d9a; color: white; padding: 2px; font-size: x-small;">Add a Meal to Day 1</div>	Topics & Meals	Category	Preferred Speaker
No Topics currently selected for this day of the Briefing.			

<div style="background-color: #6a3d9a; color: white; padding: 2px; font-size: x-small;">Add a Topic to Day 2</div> <div style="background-color: #6a3d9a; color: white; padding: 2px; font-size: x-small;">Add a Meal to Day 2</div>	Topics & Meals	Category	Preferred Speaker
No Topics currently selected for this day of the Briefing.			

<div style="background-color: #6a3d9a; color: white; padding: 2px; font-size: x-small;">Add a Topic to Day 3</div> <div style="background-color: #6a3d9a; color: white; padding: 2px; font-size: x-small;">Add a Meal to Day 3</div>	Topics & Meals	Category	Preferred Speaker
No Topics currently selected for this day of the Briefing.			

Topics can be added for any day of your visit

<div style="background-color: #6a3d9a; color: white; padding: 2px; font-size: x-small;">Add a Topic to Day 1</div> <div style="background-color: #6a3d9a; color: white; padding: 2px; font-size: x-small;">Add a Meal to Day 1</div>	Topics & Meals	Category	Preferred Speaker
<div style="background-color: #6a3d9a; color: white; padding: 2px; font-size: x-small;">Remove</div> Corporate Background and History Add Notes	Corporate Information		
<div style="background-color: #6a3d9a; color: white; padding: 2px; font-size: x-small;">Remove</div> Welcome & Agenda Review View Notes	Management Overview		

<div style="background-color: #6a3d9a; color: white; padding: 2px; font-size: x-small;">Add a Topic to Day 2</div> <div style="background-color: #6a3d9a; color: white; padding: 2px; font-size: x-small;">Add a Meal to Day 2</div>	Topics & Meals	Category	Preferred Speaker
<div style="background-color: #6a3d9a; color: white; padding: 2px; font-size: x-small;">Remove</div> Demo BriefingEdge Agenda Builder Add Notes	Demonstrations		
<div style="background-color: #6a3d9a; color: white; padding: 2px; font-size: x-small;">Remove</div> Demo BriefingEdge Calendar Integration Add Notes	Demonstrations		
<div style="background-color: #6a3d9a; color: white; padding: 2px; font-size: x-small;">Remove</div> Demo BriefingEdge Attendees Add Notes	Demonstrations		

<div style="background-color: #6a3d9a; color: white; padding: 2px; font-size: x-small;">Add a Topic to Day 3</div> <div style="background-color: #6a3d9a; color: white; padding: 2px; font-size: x-small;">Add a Meal to Day 3</div>	Topics & Meals	Category	Preferred Speaker
<div style="background-color: #6a3d9a; color: white; padding: 2px; font-size: x-small;">Remove</div> Wrap-Up / Adjourn Add Notes	Management Overview		

You can add notes linked to any topic or agenda item

Once all of the topics have been entered and assigned to the day that you want them presented, you can now rearrange them. This feature is similar to the reorder topics feature that was introduced in version 13 with the additional new feature that you can reorder topics across days.

The screenshot shows the BriefingEdge agenda management interface. At the top, a purple banner displays visit details: Visit #: 917, Visit Date: Tuesday, 9/28/2010 - Thursday, 9/30/2010, and First Day Start: 8:00 am - Last Day End: 1:00 pm. Below the banner, there are two buttons: "Drop a day in this 3-day visit" and "Reorder Agenda Items". The main content area is divided into three sections, each representing a day of the visit. Each section has a header with "Add a Topic to Day X" and "Add a Meal to Day X" buttons, followed by a table of topics. The first section (Day 1) has a "Remove" button and a "Reorder Agenda Items" button. The second section (Day 2) has a "Remove" button. The third section (Day 3) has a "Remove" button. Three callout boxes provide additional information: one pointing to the top banner, one pointing to the "Drop a day" button, and one pointing to the "Reorder Agenda Items" button.

Visit #: 917 Visit Date: Tuesday, 9/28/2010 - Thursday, 9/30/2010 First Day Start: 8:00 am - Last Day End: 1:00 pm
General Robotics

Drop a day in this 3-day visit Reorder Agenda Items

The banner at the top tells you the entire length of the visit including the time it starts and ends

Will let you drop a day making this a 2-day visit

Will let you rearrange topics within a day or across days

Add a Topic to Day 1		Topics & Meals	Category	Preferred Speaker
Remove	Add a Meal to Day 1	Corporate Background and History	Corporate Information	
Remove		Welcome & Agenda Review	Management Overview	

Add a Topic to Day 2		Topics & Meals	Category	Preferred Speaker
Remove	Add a Meal to Day 2	Demo BriefingEdge Agenda	Demonstrations	
Remove		Demo BriefingEdge Calendar	Demonstrations	
Remove		Demo BriefingEdge Attendees	Demonstrations	

Add a Topic to Day 3		Topics & Meals	Category	Preferred Speaker
Remove	Add a Meal to Day 3	Wrap-Up / Adjourn	Management Overview	

First, let's rearrange topics. Suppose I wanted to move the first demonstration on Day 2 onto the end of day 1. Just click the **Reorder Agenda Items** button and the new *drag and drop* interface makes it easy.

Reordering Agenda Items for Visit #917 Save the New Agenda Order

Arrange the agenda items by dragging and dropping them into the preferred order.
You can change the order within a day or move an item to a different day.

Day 1	Day 2	Day 3
Corporate Background and History - Corporate Information	Demo BriefingEdge Agenda Builder - Demonstrations	Wrap-Up / Adjourn - Management Overview
Welcome & Agenda Review - Management Overview	Demo BriefingEdge Calendar Integration - Demonstrations	
	Demo BriefingEdge Attendees - Demonstrations	

Here's the before screenshot showing the topics by day. Each topic is "clickable" mean you just click the topic and drag it to spot on any day where you want it to be.

Reordering Agenda Items for Visit #917 Save the New Agenda Order

Arrange the agenda items by dragging and dropping them into the preferred order.
You can change the order within a day or move an item to a different day.

Day 1	Day 2	Day 3
Corporate Background and History - Corporate Information	Demo BriefingEdge Calendar Integration - Demonstrations	Wrap-Up / Adjourn - Management Overview
Welcome & Agenda Review - Management Overview	Demo BriefingEdge Attendees - Demonstrations	

Demo BriefingEdge Agenda Builder - Demonstrations

Here I've selected the first topic from Day 2 and I'm dragging it to the end of day one where the little black arrow is.

Once you have the topics on the days that you want them and in the relative order that you want them presented, simply press the button **Save the New Agenda Order**.

Reordering Agenda Items for Visit #917 Save the New Agenda Order Return to Visit

Arrange the agenda items by dragging and dropping them into the preferred order. You can change the order within a day or move an item to a different day. [Click here to save the Agenda Items in the order shown](#)

Day 1	Day 2	Day 3
Corporate Background and History - Corporate Information	Demo BriefingEdge Calendar Integration - Demonstrations	Wrap-Up / Adjourn - Management Overview
Welcome & Agenda Review - Management Overview	Demo BriefingEdge Attendees - Demonstrations	
Demo BriefingEdge Agenda Builder - Demonstrations		

Returning to the **Topics and Meals** screen, your topics are now in the order that you want and on the days that you want them presented. This feature is currently only available for Tentative visits. The BriefingEdge staff is currently working on a version for Confirmed visits.

Visit #: 917 Visit Date: Tuesday, 9/28/2010 - Thursday, 9/30/2010 First Day Start: 8:00 am - Last Day End: 1:00 pm
General Robotics

Drop a day in this 3-day visit Reorder Agenda Items

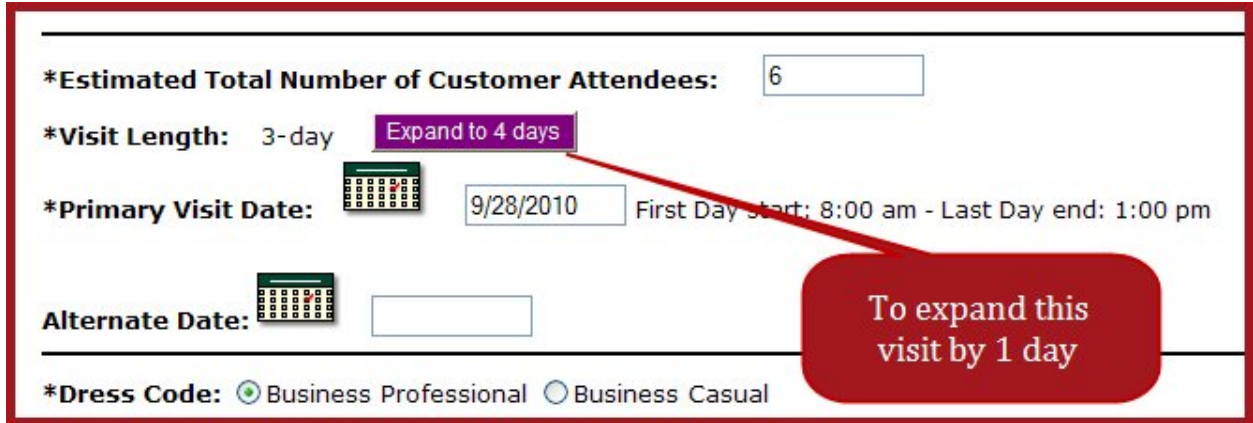
Add a Topic to Day 1		Topics & Meals	Category	Preferred Speaker
Add a Meal to Day 1	Remove	Corporate Background and History Add Notes	Corporate Information	
	Remove	Welcome & Agenda Review View Notes	Management Overview	
	Remove	Demo BriefingEdge Agenda Builder Add Notes	Demonstrations	

Add a Topic to Day 2		Topics & Meals	Category	Preferred Speaker
Add a Meal to Day 2	Remove	Demo BriefingEdge Calendar Integration Add Notes	Demonstrations	
	Remove	Demo BriefingEdge Attendees Add Notes	Demonstrations	

Add a Topic to Day 3		Topics & Meals	Category	Preferred Speaker
Add a Meal to Day 3	Remove	Wrap-Up / Adjourn Add Notes	Management Overview	

Extended Length Visits – Shrinking an extended visit

You can also shrink the visit by a day, taking a 5-day visit to 4 days; a 4-day visit to 3 days and so on. This complements the same ability to expand a visit on the first screen.



*Estimated Total Number of Customer Attendees:

*Visit Length: 3-day [Expand to 4 days](#)

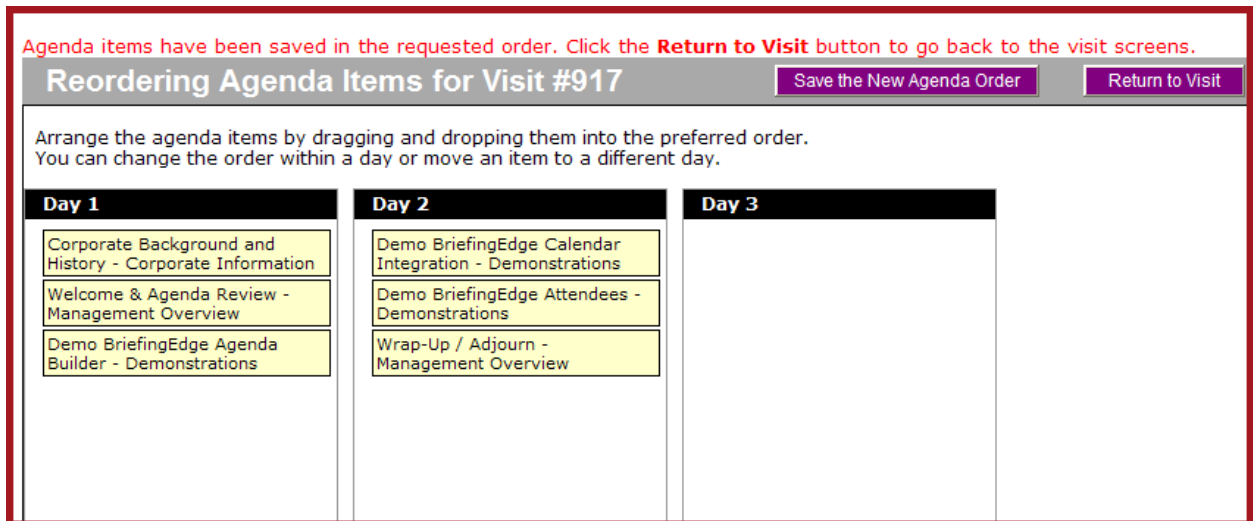
*Primary Visit Date: First Day Start: 8:00 am - Last Day end: 1:00 pm

Alternate Date:

*Dress Code: Business Professional Business Casual

To expand this visit by 1 day

Now, let's take the 3-day visit we were working with and change it to a 2-day visit. The first thing we want to do is move all the topics that we still want onto the remaining two days. Using the topics we have from the screenshot above, we simply want to move the Wrap-up / Adjourn topic to the end of day 2. So we reorder the agenda items, dragging the day 3 topic to the end of day 2.



Agenda items have been saved in the requested order. Click the **Return to Visit** button to go back to the visit screens.

Reordering Agenda Items for Visit #917 [Save the New Agenda Order](#) [Return to Visit](#)

Arrange the agenda items by dragging and dropping them into the preferred order. You can change the order within a day or move an item to a different day.

Day 1	Day 2	Day 3
Corporate Background and History - Corporate Information	Demo BriefingEdge Calendar Integration - Demonstrations	
Welcome & Agenda Review - Management Overview	Demo BriefingEdge Attendees - Demonstrations	
Demo BriefingEdge Agenda Builder - Demonstrations	Wrap-Up / Adjourn - Management Overview	

That was easy enough and now let's remove day 3 altogether by selecting this button.

[Drop a day in this 3-day visit](#)

Drop First or Last Day in this 3-Day Visit - Visit # 917

This visit is currently scheduled for 9/28/2010 thru 9/30/2010

There are currently 3 agenda items scheduled on Day 1.
There are currently 3 agenda items scheduled on Day 2.
There are currently 0 agenda items scheduled on Day 3.

BriefingEdge summarizes the number of topics on each day

- Drop Day 1 from the Visit, delete the 3 agenda item(s)**
Visit will run from 9/29/2010 to 9/30/2010.
- Drop Day 3 from the Visit**
Visit will run from 9/28/2010 to 9/29/2010.

You can drop the first or the last day of the visit

Cancel

Drop the Selected Day

Notice how **BriefingEdge** summarizes the number of topics you currently have for each day. This is a little reminder in case you forgot to move some topics to other days before dropping that day.

Also note that you can only drop the first day or the last day. **BriefingEdge** will not let you have a visit that starts on one day, skips one or more days and then finishes up a few days later. In this example we had intended to drop day 3. That's why we moved it's topic onto the end of day 2. We simply select **Drop Day 3** and press the **Drop the Selected Day** button.

Here's our new topic screen. Notice the banner at the top says that we are now scheduled for 2 days from 9/28/2010 – 9/29/2010.

Visit #: 917 Visit Date: Tuesday, 9/28/2010 - Wednesday, 9/29/2010 First Day Start: 8:00 am - Last Day End: 5:00 pm
General Robotics

Drop a day in this 2-day visit Reorder Agenda Items

	Topics & Meals	Category	Preferred Speaker
Add a Topic to Day 1			
Add a Meal to Day 1			
Remove	Corporate Background and History Add Notes	Corporate Information	
Remove	Welcome & Agenda Review View Notes	Management Overview	
Remove	Demo BriefingEdge Agenda Builder Add Notes	Demonstrations	
Add a Topic to Day 2			
Add a Meal to Day 2			
Remove	Demo BriefingEdge Calendar Integration Add Notes	Demonstrations	
Remove	Demo BriefingEdge Attendees Add Notes	Demonstrations	
Remove	Wrap-Up / Adjourn Add Notes	Management Overview	