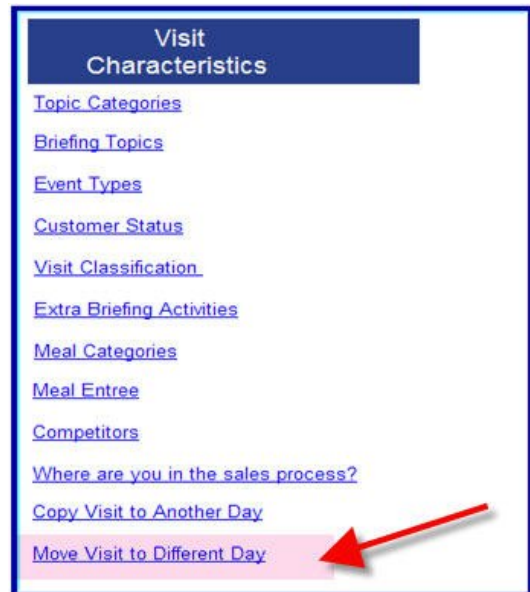


Administrative MOVE Function – Why would you use it?

BriefingEdge now provides an Administrator with a powerful function to MOVE an individual visit to different day. There may be occasions where you want to MOVE a visit already scheduled to a date unavailable to a Requester (due to scheduling rules). This MOVE function not only places the visit in a new date and time slot, but it also removes all traces of that visit from its previous date and time location.

The MOVE function can effectively be used to override the scheduling rules that you've defined for that site (maximum number of visits per day, number of days in advance, etc.) which limit the Requester.

Begin the MOVE process by clicking on the “**Move Visit to Another Day**” selection, under **Visit Characteristics** on your Administrative Menu.



It is extremely important to note that **NO CONFLICT CHECKING** is performed in association with this function, and the below warning is displayed as you begin to use this function (as a reminder, of course).

WARNING: NO CONFLICT CHECKING IS PERFORMED FOR THIS FEATURE.
This feature is only intended to be used when you know in advance that the new visit date, room, and coordinator are ALL available.

Before you Move, verify that all the resources are available on the new date, so that you don't create duplicate bookings of rooms or speakers.

Visit Number:



As explained in the above warning, you must know **BEFOREHAND** that you are not creating a duplicate booking for your rooms or speakers. It is also important to note that "moving" a visit **DOES NOT** alter any of its current information including its site, room or assigned speakers. To begin the process, simply enter the number of the visit you wish to move in the text box behind "Visit Number:" (see arrow above), then click on the "Display the Visit Info" button.

BriefingEdge will display the current information of the "source" visit. After you review that information, and are ready to move the visit, click on the "Continue" button.

WARNING: NO CONFLICT CHECKING IS PERFORMED FOR THIS FEATURE.

This feature is only intended to be used when you know in advance that the new visit date, room, and coordinator are ALL available.

Before you Move, verify that all the resources are available on the new date, so that you don't create duplicate bookings of rooms or speakers.

Visit Number:

Type of Visit: Customer Briefing at Princeton Innovation Center

Customer: Acme Satellites

Status: Confirmed

Visit Date/Times: 1/29/2010 9:00:00 AM -
1/29/2010 1:00:00 PM

Visit 729 is being MOVED

Type of Visit: Customer Briefing at Princeton Innovation Center

Customer: Acme Satellites


Status: Confirmed

Original Visit Date/Times: 1/29/2010 9:00:00 AM -
1/29/2010 1:00:00 PM

New Coordinator:

New Room:

New Status:

MOVE this Visit to New Date: 

Click on a date to ...

about:blank

January 2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Internet 100%

BriefingEdge will continue the move function by allowing you to enter the new information for the target date, which you will be able to enter by using the drop-down button and subsequent lists that will appear. When you have selected the correct information (Coordinator, Room, and Status) for the moved visit, you will click on the calendar icon to indicate (and select) the new date for the visit. When you are satisfied with your choices, simply click on the **Move** button.



TAH DAH! The message appearing at the bottom of your screen will indicate that your MOVE has been successful. This function does not generate a new visit number, and the original visit number remains unchanged. If you need to alter any of the data (speakers, agenda topics, etc.) you can access this visit from the Main Menu "Work on a Future Visit" function.

Visit 729 is being MOVED

Type of Visit: Customer Briefing at Princeton Innovation Center

Customer: Acme Satelites

Status: Confirmed

Original Visit Date/Times: 1/25/2010 9:00:00 AM -
1/25/2010 1:00:00 PM

New Coordinator: ▼

New Room: ▼

New Status: Confirmed

The visit has been Moved to 01/25/2010.

You cannot repeat this function. Your only choice at this point is to "Return to the Admin Menu" by clicking on that button in the top banner.