

## Technical Product Descriptions for ActiveEvents Conference™ Event Management Technology

ActiveEvents Conference is sold in separate modules. This document explains the features and services that are included in each module.

Each software module that you purchase generally includes:

**An End-User Web Application.** These web tools let the people who participate in your event – such as attendees, speakers, exhibitors and your on-site staff – enter or view data.

**Management Tools.** The [Administration Tool](#) lets your staff and ActiveEvents set up the end-user applications, and then view, update and report on your event data.

**Professional Services.** ActiveEvents staff members become part of your event management team and provide these services for each module:

- ♦ A **Project Manager** helps you plan and track your software implementation timeline.
- ♦ A **Business Analyst** trains you on how to use the management tools and helps you set up the software using information you provide on Implementation Forms.

**Note:** This document outlines the services your Business Analyst *may* provide for each module. Actual services provided may differ depending on the hours allocated in your Scope of Work.

In addition to software modules and the associated services, you may also purchase **on-site systems** (including hardware, software, and services) and **additional professional services**, such as **custom software programming** for a specific module.

### Registration

The Registration area lets you manage the sign-up, information gathering, shopping cart, and payment for event registration. It includes these modules:

- ♦ **Attendee Registration** Lets people sign up and pay to attend your event.
- ♦ **Hotel** Lets registered attendees request a reservation for hotel room.
- ♦ **Nomination Tools** Lets you use a nomination process to determine who is invited to register.

### Exhibits

The Exhibitor area lets you manage the companies and organizations that host exhibit booths, buy sponsorship packages, or buy other marketing opportunities associated with your event. It includes these modules:

- ♦ **Exhibitor and Sponsor Sales** Lets event exhibitors or sponsors sign up to participate.
- ♦ **Call for Demos** Lets your company's employees submit demo proposals through an online form.
- ♦ **Exhibitor Tasks** Lets exhibitors manage their staff registrations, order services, and complete any deliverables.
- ♦ **Lead Management** Lets exhibitors search for leads, create lists, and send email.

### Content

The Content area lets you manage the content and session schedule for your event, including lectures, training classes, workshops, meetings, and entertainment. It includes these modules:

- ♦ **Call for Papers** Lets potential speakers or other users submit session proposals.
- ♦ **Voting** Lets committees vote on sessions.
- ♦ **Session Management** Lets content managers approve submitted sessions, and also create or import new session records.
- ♦ **Speaker Resource Center®** Lets speakers complete tasks related to session participation.
- ♦ **Session Catalog and Personal Scheduler** Lets the public learn about the sessions offered at your event. Also, lets registered attendees add sessions to their personal schedules.
- ♦ **One-on-One Meetings** Lets attendees schedule an on-site meeting with company executives or experts, or schedule a room for a private meeting.

### Social Networking

**ActiveEvents Connect™** Lets attendees learn about and contact other attendees, speakers, or exhibitors before, during, and after your event.

## Surveys

**Surveys** Lets attendees respond to custom surveys about sessions or your event in general.

## Onsite

Onsite tools help your staff manage the activities that happen at your event. Each system below is purchased separately.

- ◆ [Check-in and Badging](#)
- ◆ [Instant Schedule Printing](#)
- ◆ [Cyber Café Kiosk](#)
- ◆ [Gift and Materials Distribution](#)
- ◆ [ActiveEvents Leads™](#)
- ◆ [Session Access Control™](#)
- ◆ [On-site Server Cluster](#)

**Note:** Onsite tools may include hardware rental as well as software and services. On-site resources do not include the items listed in the [On-site Resources Not Provided](#) section.

## Event Analytics

**Web Analytics** Lets you track the traffic to your Registration site and analyze the success of your event marketing campaigns.

## Additional Professional Services

ActiveEvents staff can provide the following services to help you achieve the goals of your event.

Software Implementation:

- ◆ [Software Customization or Integration](#)
- ◆ [System Architecture](#)
- ◆ [Web Site Hosting and Management](#)
- ◆ [Extended Application Hosting](#)
- ◆ [Software Training](#)

Management:

- ◆ [Registration Management](#)
- ◆ [Hotel Management](#)
- ◆ [Content Management](#)
- ◆ [Exhibitor Management](#)

Attendee Registration Support:

- ◆ [Registration Call Center Support](#)
- ◆ [On-site Registration Help Desk Staff](#)

Financial Services:

- ◆ [ActiveEvents Merchant Services and Accounting](#)
- ◆ [Merchant Services Integration](#)

Materials Ordering:

- ◆ [Badges, Badge Holders, Lanyards & Ribbons](#)

## General Guidelines

For all software modules, ActiveEvents requires you (the client) to provide the following:

- ◆ The detailed requirements, business rules, pricing, etc., needed to configure the software. For most modules, you will submit this information on Implementation Forms that ActiveEvents will provide.
- ◆ Timely approval of content or decisions which are needed by ActiveEvents to deliver on its assigned duties and tasks.
- ◆ Training for your end-users. (ActiveEvents will train your managers on how to use the management software, but you must provide any needed training for speakers or exhibitors on the tools they will use.)
- ◆ Event management services.
- ◆ Other professional services, unless you contract with ActiveEvents to provide specific [Additional Professional Services](#).
- ◆ If you collect and process payments from attendees or exhibitors, your merchant account must use one of the following payment gateway systems to process credit card transactions: VeriSign Payflow Pro, Authorize.Net, JetPay, or Verifi. If another gateway is used, you must pay for [Software Customization or Integration](#) services to integrate ActiveEvents Conference with the other gateway.

## About this Document

In this document, the blue text identifies links that take you to other sections in this document or to web resources. If you view this file from a computer that is linked to the Internet, you can click the Watch Video link for each module to view a demonstration of the end-user web application. If you are reading a paper copy of this document, you can go to a web page of these videos by entering this URL in your web browser:

<http://www.wingateweb.com/support/conf/tutorials>

The content of this document is subject to change without notice. For the latest information, talk with your Sales Representative or your Business Analyst. This document is compatible with Active Conference 6.1 released in April 2010. Information in this document may also be compatible with later versions. Tutorial videos are compatible with Conference 5.1 (formerly WingateWeb Conference) released in March 2009.

## Registration

Registration in ActiveEvents Conference provides online tools to let you manage the attendee registration for your event. You can use these Registration modules to manage all aspects of attendee registration, from pricing and profile questions to hotel reservation requests and nominations:

- [Attendee Registration](#)
- [Hotel](#)
- [Nomination Tools](#)

### Attendee Registration

The Attendee Registration Site is a series of web pages that walk people through registration for your event. This series of pages is called a *registration path*. Your site can include different registration paths for different types of attendees. Users enter a path by entering a registration code, by choosing a certain response at a profile question, or by choosing a certain registration package.

**Included Features and Services** [Watch Video](#)

#### Attendee Tools

To register for your event, attendees can:

- ♦ Enter **contact information** to create a user account.
- ♦ Create a user profile by answering your **custom questions**.
- ♦ Choose registration **packages** or purchase items. Examples:
  - Full Event Pass
  - Day Pass
  - Guest Pass
  - T-shirt
  - Group purchase (one user can buy passes for several attendees)
- ♦ **Pay** for the selected items. Sample payment options:
  - Credit card
  - Check
  - Wire Transfer
  - Cost Center
  - Purchase Order
- ♦ Read a **cancellation policy**.
- ♦ **Confirm** registration choices.

As advanced settings, attendees can:

- ♦ Enter a promotional or **registration code** to identify attendee type.
- ♦ Receive **discounts** based on:
  - Early-bird registration
  - Attendee type
  - Answer to a profile question
  - Other custom rule
- ♦ Answer more **specialized custom questions** based on the package purchased.

#### Management Tools

Registration Managers can:

- ♦ **Complete registration** on behalf of an attendee.
- ♦ **Modify** an attendee's registration details (such as, edit contact information, reset user password, add a payment, replace a package with a different one, change answers to profile questions).
- ♦ **Cancel** registration and record a refund.
- ♦ **Transfer** a registration from one user to another (including registration code, items purchased, scheduled sessions, and wait-listed sessions).
- ♦ Send **emails** to registered attendees.
- ♦ **Approve Press registrations** using an interactive report.
- ♦ View attendee and registration data in **reports**, such as:
  - Registration counts by day and week
  - Payment transactions
  - Summary of packages purchased
  - Order balances of funds still to be collected
  - Refunds owed to attendees
  - Revenue by month
  - A complete finance summary

#### Professional Services

Using information you provide, ActiveEvents can:

- ♦ Customize the **branding** for your Attendee Registration site.
- ♦ Create **custom fields** that are unique for your event.
- ♦ Set up your **registration paths**, including contact information fields, custom questions, packages, and payment options.
- ♦ Configure **package rules** such as prerequisites, discounts, and cancellation fee.
- ♦ Configure **advanced package settings** such as:
- ♦ Sessions offered based on package selection.
- ♦ Custom fields based on package selection.
- ♦ Create **custom reports**.
- ♦ Create **import templates**.
- ♦ Implement **CRM look-up** on email address to import attendee data from another database. (Available with minimal Custom Development.)

After set up is complete, ActiveEvents can:

- ♦ **Train your Registration Manager** on how to use the Management tools.

## Attendee Registration (continued)

### Attendee Tools

- ◆ Choose which sessions to attend based on the package purchased.
- ◆ Register on behalf of another attendee (**proxy registration**).

After registration is complete, attendees can:

- ◆ Receive an email **invoice**.
- ◆ Log back in to a My Account page to view or **modify registration** details.
- ◆ **Print an invoice** from the My Account page.
- ◆ Take a **personal photo** (if attendee's computer has a web camera).

Access other modules from a My Portal page.

### Management Tools

- ◆ **Import user data** such as:
  - New or updated user data
  - Registration code data
  - Standard company information

### Professional Services

### Not Included

For additional cost, some of these items may be possible as custom software updates or as custom services.

### Attendee Tools

Attendees do NOT do the following as part of the standard registration:

- ◆ Register for multiple events through a single registration path.
- ◆ Reserve a hotel room. (Sold separately. See [Hotel Reservations](#) on page 5.)
- ◆ Make flight reservations.
- ◆ View images related to registration packages.
- ◆ Register for multiple events in one registration path.
- ◆ Go directly to the Session Scheduler after registering. (The Scheduler can be linked from the My Account page.)

### Management Tools

Registration Managers can NOT:

- ◆ Apply multiple payments to an order.
- ◆ Send out payment reminders.
- ◆ Manage registration logistics.
- ◆ Manage registration for multiple events in a single administration tool.
- ◆ Send out marketing email messages
- ◆ Report on multiple events in a single tool (does not compare this year with last year, or this event with another event).

### Professional Services

ActiveEvents does NOT:

- ◆ Create your event web site (Sold separately. See [Web Site Hosting and Management](#) on page 37.)
- ◆ Customize branding for individual registration paths.
- ◆ Send out payment reminders.
- ◆ Train your attendees on how to use the Attendee tools.

**Note:** If you let attendees pay by credit card, then you must also purchase either [ActiveEvents Merchant Services and Accounting](#) (see page 46) or [Merchant Services Integration](#) (see page 47).

## Hotel

Attendees can request a hotel room reservation during registration or after registering. Management tools let you control which hotel rooms are available for certain types of attendees.

### Included Features and Services

[Watch Video](#)

#### Attendee Tools

Attendees can:

- ◆ Choose the **check in and check out dates** for their hotel stay.
- ◆ View list of room types available at specific hotels for the selected dates, including a **description** and **nightly rate** for each room type.
- ◆ Select the specific **hotel and room type** for which to request a room reservation.
- ◆ Enter **credit card** information to reserve the room.
- ◆ Enter additional information in **custom fields** (such as Smoking or Non-Smoking room).
- ◆ View the **cancellation policy**
- ◆ Print an **invoice**

As advanced settings, an attendee may also:

- ◆ Choose a **roommate**.

After registration is complete, attendees can:

- ◆ Receive an **email** confirmation
- ◆ Log in to the **My Account** page to view or modify hotel details
- ◆ Accept or reject a **roommate request** via email

#### Management Tools

A Registration Manager can:

- ◆ Manage the available hotel rooms in **sub-blocks** so that only those attendees who meet specific criteria can request a reservation for certain types of rooms.
- ◆ **Add** a hotel reservation request to an attendee's user record.
- ◆ **Change** or **cancel** an existing reservation request.
- ◆ View the **history** of reservation requests for a specific person.
- ◆ Send a **change report** to the Hotel Manager to notify which reservation requests have been added, changed, or removed since the last report.
- ◆ View other **hotel reports**.

The Hotel Manager for a specific hotel can view this information in reports:

- ◆ View a list of rooms and **reservation request** for each room.
- ◆ View the reservation request **changes**.
- ◆ View a summary of the rooms requested or still available in a specific **sub-block**.
- ◆ View hotel reservation request data in **reports**, such as:
  - Summary of all hotel rooms requested.
  - Requested rooms by room type
  - Requested rooms by days
  - Reservation requests that have changed between specific dates.
  - Attendees who don't yet have a roommate.

#### Professional Services

Using information you provide, ActiveEvents can:

- ◆ Set up **hotels, hotel rooms, descriptions, and pricing**.
- ◆ Set up **sub-blocks**.
- ◆ Set up rules for **roommate matching**.
- ◆ Set up **custom fields** that let you gather extra data about a hotel reservation request.
- ◆ Create **custom reports**.

Advanced settings:

- ◆ Set up **master billing** so specified attendees' reservation requests are charged to a single credit card.
- ◆ Integrate the ActiveEvents Conference hotel records with a hotel's **Passkey** system.

After set up is complete, ActiveEvents can:

- ◆ Train your Registration Manager on how to use the **sub-block management** tools and how to update hotel information in a **user record**.
- ◆ Train the **Hotel Manager**.

## *Hotel (continued)*

### Not Included

For additional cost, some of these items may be possible as custom software updates or as custom services.

#### **Attendee Tools**

Attendees can NOT:

- ◆ Pay for a hotel through Registration. Instead, the credit card information is sent to the hotel, and the hotel personnel charge the card.
- ◆ Place an actual reservation. The tools allow a request for a reservation to be sent to the Hotel. (An exception is if Passkey is implemented.)

#### **Management Tools**

Registration Managers can NOT:

- ◆ Transfer a hotel order from one user to another. (Instead, the hotel must be contacted directly if someone needs to cancel and their reservation will be used by another person.)

#### **Professional Services**

ActiveEvents does NOT:

- ◆ Monitor your hotel room pickup or attrition levels.

## Nomination Tools

The Nomination Tool lets you manage which people are invited to register for your event. Your sales staff or other authorized people at your company (the *nominators*) submit names of potential attendees who they would like to be invited to register for your event (the *nominees*). Other staff (the *approvers*) can then approve or reject individual nominees. The approved nominees receive an email invitation.

### Included Features and Services

#### Nominator and Approver Tools

Nominators can do the following in the Nomination Tool:

- ◆ **Submit nominees** including name, company name, job title, email address, and custom fields.
- ◆ Assign a **registration code** to the nominee. (For example, the registration code may allow this person to register for a reduced price or for free.)
- ◆ View a list of registration codes for which he or she is the **owner**, and see how many nominees he or she is allowed to submit for each registration code.
- ◆ View the **status** of nominees (approved, pending, or rejected).

Approvers can do the following in the Nomination Tool:

- ◆ **Accept or reject** a nominee.
- ◆ Send **invitation email messages** to accepted nominees.
- ◆ Send a **registration reminder message**.

#### Management Tools

Registration Managers can do the following:

- ◆ Identify which users are **nominators**.
- ◆ Set up the **registration codes** for each nominator.
- ◆ Manage the numbers of nominees **invited vs. those who have actually registered**.

#### Professional Services

Using information you provide, ActiveEvents can:

- ◆ Customize the **branding** for your Nomination site.
- ◆ Create the **categories of data** used during nomination (including registration code groups).
- ◆ Create **custom reports** to track registration code usage, registration conversions, etc.

After set up is complete, ActiveEvents can:

- ◆ **Train your Registration Manager** on how to manage the registration codes used in the nomination process.

### Not Included

For additional cost, this item may be possible as a custom service.

#### Professional Services

ActiveEvents does NOT:

- ◆ Train your nominators or approvers on how to use the Nomination tool.

## Content

As one of the core features of ActiveEvents Conference, Content lets you set up and manage any scheduled session at your event, such as a training course, a workshop, a keynote address, or an after-hours dinner. You can use these Content modules to manage the complete content and session process—from a Call for Papers to session scheduling:

- [Call for Papers](#)
- [Voting](#)
- [Session Management](#)
- [Speaker Resource Center](#)
- [Session Catalog and Personal Scheduler](#)
- [One-on-One Meetings](#)

### Call for Papers

The Call for Papers application lets you accept public or private proposals for presentations. To submit a proposal, the user enters information in a series of web pages called a *path*. Your Call for Papers site can include different paths for different types of sessions. For example, you can gather different data for a Lecture than you would a Hands-On Workshop.

#### Included Features and Services

[Watch Video](#)

##### Submitter Tools

The people who submit session proposals can:

- ♦ Choose a **session type**.
- ♦ Enter a **session title and abstract**.
- ♦ Choose a **technical level** for the proposed audience.
- ♦ Select the **length** (duration in time) of the session.
- ♦ Enter information about **session participants** (such as name, email, speaker experience, or biographical information).
- ♦ Choose the appropriate **role** for each participant (such as speaker or panelist).
- ♦ Create a session profile by completing **custom fields** (such as choosing a Track or Product Category).
- ♦ Upload **files**.
- ♦ **Email or print** a copy of their submitted information.

As advanced settings, a submitter may also:

- ♦ Enter a **username and password** to access the Call for Papers site.
- ♦ **Volunteer to participate** at your event in a way not tied to a specific session.

##### Management Tools

Content Managers can:

- ♦ **Activate** or deactivate the Call for Paper site.
- ♦ **Publish** the submission path for each session type separately.
- ♦ **Review** the proposed sessions.
- ♦ **Approve or reject** sessions.
- ♦ Convert the submitted for proposed speakers or other participants into a **user record** for each individual.

##### Professional Services

Using information you provide, ActiveEvents can:

- ♦ Customize the **branding** for your Call for Papers site.
- ♦ Set up separate **Call for Papers paths** for different types of sessions.
- ♦ Create all **categories of data** that can be selected during the submission (including session types, speaker roles, technical levels, and lengths).
- ♦ Create the **custom fields** for each path.
- ♦ Enable the **Volunteer** site if you choose to use that feature.
- ♦ Create **custom reports**.

After set up is complete, ActiveEvents can:

- ♦ **Train** your Content Manager on how to manage the Call for Papers site.

## *Call for Papers (continued)*

### Not Included

For additional cost, some of these items may be possible as custom software updates or as custom services.

#### Management Tools

Content Managers can NOT:

- ♦ Vote as a committee on which proposed sessions to accept. (Sold separately. See [Voting](#) on page 10.)

#### Professional Services

ActiveEvents does NOT:

- ♦ Customize branding for individual Call for Papers paths.
- ♦ Train submitters on how to use the Call for Papers application.

## Voting

The Voting tool lets a committee review proposed sessions and help decide which sessions will be offered at your event.

### Included Features and Services

[Watch Video](#)

#### Voter Tools

Session voters can:

- ◆ **Read session information** including title, abstract, technical level, name of submitter, and proposed speakers.
- ◆ **Rate** the session by choosing one of several ballot options.
- ◆ Enter **comments** to explain their rating choice.
- ◆ **Filter** the list of sessions by session type, status, or custom fields such as Track or Product Category.

#### Management Tools

Content Managers can do the following before voting starts:

- ◆ Decide whether to have several **voting periods** (for example, for different voting committees).
- ◆ Decide which **sessions are included** in voting (based on the session status).
- ◆ Decide who **participates** as voters.
- ◆ Send an **email message** to invite voters to participate.
- ◆ **Turn on** the Voting tool at the start of a voting period.

Content Managers can do the following after voting is completed:

- ◆ **Turn off** the Voting tool.
- ◆ **Filter** the list of sessions.
- ◆ View voter **ratings and comments**.
- ◆ View the **average rating score** for a session.
- ◆ Use a worklist in the Content module to **approve or reject** sessions by editing the session status.

#### Professional Services

Using information you provide, ActiveEvents can:

- ◆ Configure an **email invitation** to invite voters to participate.
- ◆ Set up **ballot options** that are used to rate the sessions.
- ◆ Set up **filtering options**.
- ◆ Include read-only **custom field data** that voters can see within the Voting tool.
- ◆ Create **custom reports** as needed.

After set up is complete, ActiveEvents can:

- ◆ Train your Content Manager on how to use the Voter tool and Management tools.

### Not Included

For additional cost, some of these items may be possible as custom software updates or as custom services.

#### Voter Tools

Session voters can NOT:

- ◆ Edit session records.

#### Management Tools

Content Managers can NOT:

- ◆ **Approve or reject** sessions while viewing the voting results.

#### Professional Services

ActiveEvents does NOT:

- ◆ Train the members of your voting committee on how to use the Voting tool.
- ◆ Customize the branding for your Voting site. (Voting takes place through the Administration Tool.)

## *Session Management*

Content Managers can manage session records through the Administration Tool.

### Included Features and Services

#### Management Tools

Content Managers can:

- ◆ **Create** session records manually or by **importing** from a file.
- ◆ View and edit **session details** that were entered during the Call for Papers.
- ◆ Manage **user accounts** for speakers and other session participants.
- ◆ Run **reports** to view session data, such as:
  - Sessions by speaker.
  - Sessions by status.
  - Sessions by technical level.
  - Sessions without an assigned speaker.
  - Approved sessions not on the schedule.
- ◆ **Import** new or updated session data.
- ◆ Send **emails** to session participants.

#### Professional Services

Using information you provide, ActiveEvents can:

- ◆ Create the **data elements** used in creating session records (such as session types, technical level, and status).
- ◆ Create **custom fields** to let you track session data that is unique for your event.
- ◆ Create **custom reports**.
- ◆ Create **import templates**.

After set up is complete, ActiveEvents can:

- ◆ **Train** your Content Manager on how to use the Management tools.

## Speaker Resource Center® (SRC)

The Speaker Resource Center enables speakers and other participants (such as track owners, content reviewers, and copy editors) to manage their participation in your event from a single web application.

### Included Features and Services

[Watch Video](#)

#### Speaker & Participant Tools

Approved speakers and other participants can complete 3 different types of tasks:

- ◆ **Session tasks** are completed once per session. Examples:
  - Enter or edit the abstract.
  - Submit audio/visual requirements.
  - Enter a session profile data (in custom fields).
  - Upload a presentation file.
- ◆ **File tasks** are completed for each presentation file that has been uploaded. Examples:
  - Review the file content.
  - Copy edit the file.
- ◆ **Participant tasks** are completed only once per person per event, such as:
  - Enter or edit speaker biography.
  - Register for the event.
  - Reserve a hotel room.

Additionally:

- ◆ Participants can **check off** each task as it is completed.
- ◆ Reviewers can **reject** tasks and require participants to re-submit their work.

#### Management Tools

Content Managers can:

- ◆ Create the **tasks**.
- ◆ Determine the **due date** and the **order** in which tasks should be completed.
- ◆ Identify the **session type** for which certain tasks must be completed.
- ◆ Identify which **participants** should complete specific tasks (by specifying a session role).
- ◆ Identify the online page where the person should complete the task:
  - A pre-defined page in the session record.
  - A page of custom fields.
  - An external web page referenced by URL.
- ◆ Run **reports** to find out the status of tasks, such as:
  - Which participants have completed their assigned tasks.
  - Which sessions are missing a presentation file.
  - Which speakers have not yet registered for the event.

#### Professional Services

Using information you provide, ActiveEvents can:

- ◆ Customize the **branding** for your Speaker Resource Center site.
- ◆ Create the **categories of data** used in creating tasks (such as session types, participant roles, custom field pages)
- ◆ Use **custom fields** to create custom pages where participants can complete tasks (such as fields on an audio/visual requirements page).
- ◆ Create **emails** for contacting participants.
- ◆ Create **custom reports**.

After set up is complete, ActiveEvents can:

- ◆ **Train** your Content Manager on how to use the task Management tools.

### Not Included

For additional cost, this item may be possible as a custom service.

#### Professional Services

ActiveEvents does NOT:

- ◆ Train the speakers or other session participants on how to use the Speaker Resource Center.

## Session Catalog and Personal Scheduler (SCPS)

The Attendee Session Scheduler is a separate web site where an attendee can reserve a place in scheduled sessions.

### Included Features and Services

[Watch Video](#)

#### Attendee Tools

The **Session Catalog** area lets attendees:

- ♦ View a **list of sessions** offered at your event including:
  - Title, session type, abstract
  - Speaker and speaker biography
  - Schedule information (after schedule has been created)
- ♦ **Filter or sort** the list by title, audience, day in the schedule, or other custom criteria.
- ♦ Create a **My Interests** list of the sessions they may want to attend.
- ♦ See a **day-at-a-glance** session calendar.
- ♦ View a **catalog of exhibitors** (if Exhibitor module is used).

The **Personal Scheduler** area lets attendees:

- ♦ **Add sessions** to their personal schedule.
- ♦ Use an **Auto-Schedule** feature to convert the attendee's chosen My Interests session list into a schedule.
- ♦ Reserve blocks of **personal time** on the personal schedule.
- ♦ Add their name to a **waiting list** if the session is currently full.

#### Management Tools

Your Content Manager can:

- ♦ **Create the session schedule** by assigning each session to a specific day, time, and room. (Note: The system prevents booking a speaker or room for two sessions at the same time.)
- ♦ **Manage the schedule** such as viewing which sessions are reaching capacity, moving a scheduled session to a different room or time.
- ♦ **Send email** to session speakers, registered attendees, or attendees on a waiting list for the session.
- ♦ **Update the Personal Schedule** for an individual attendee by editing his or her user record.
- ♦ **Run reports** related to the session schedule such as:
  - Sessions by day
  - Sessions by room
  - Attendees on waiting lists for full sessions
  - Speakers' schedules
  - Attendance by day and room
- ♦ **Import user data** such as:
  - Sessions a user has scheduled.
  - Sessions a user has attended.

#### Professional Services

Using information you provide, ActiveEvents can:

- ♦ Customize the **branding** for your Session Catalog and Personal Scheduler site.
- ♦ Create all **categories of data** that are used to create a schedule (including days, times, rooms).
- ♦ Configure **rules that govern scheduling** including:
  - Who can access the Personal Scheduler
  - Which sessions display only for attendees who match a certain criteria (such as attendee type or a signed non-disclosure agreement).
- ♦ Create **custom reports**.
- ♦ Create **import templates**.

After set up is complete, ActiveEvents can:

- ♦ **Train your Content Manager** on how to schedule sessions.

### Not Included

For additional cost, some of these items may be possible as custom software updates or as custom services.

#### Attendee Tools

Attendees can NOT:

- ♦ Schedule more than one session for a single time. (The system prevents such conflicts.)
- ♦ Auto-schedule more than 30 sessions at a time.
- ♦ Schedule a meeting. (Sold separately. See [One-on-One Meetings](#) on page 14.)

#### Management Tools

Content Managers can NOT:

- ♦ Create the schedule by importing it from a file.
- ♦ Schedule a speaker for multiple sessions at the same time. (The system prevents such conflicts.)

#### Professional Services

ActiveEvents does NOT:

- ♦ Train your attendees on how to use the session catalog or how to add sessions to their schedules.

## One-on-One Meetings

The One-on-One Meetings module lets you manage private meetings that take place during an event. You can manage the approval and room assignments for these meetings.

A registered attendee can use the Meetings tool to:

- Request a meeting with a specific *Meeting Host* (such as a product expert, an executive from your company, a VIP at your event, etc.). Hosts can be searched for by topic.
- Request a room where a private meeting can be held with other attendees. (This functionality is also available in [ActiveEvents Connect](#).)

**Note:** The One-on-One Meetings module requires that you use the [Session Catalog and Personal Scheduler](#) module.

### Included Features and Services

[Watch Video](#)

#### Attendee Tools

After registering for an event, Attendees can do the following to request a meeting (for themselves or on behalf of other attendees):

- ♦ Log in to the **Personal Scheduler** and choose one of these **meeting types**:
  - A meeting with a **Meeting Host** to discuss a specific **topic**.
  - A **room reservation** for a private meeting.
- ♦ Complete **custom fields** to provide information about the meeting request.
- ♦ Choose a **Meeting Host** and/or choose **attendees** to invite to the meeting.
- ♦ Request a **length, day and time** for the meeting.

After the meeting is reviewed by an approver, the attendee can:

- ♦ Receive an **email notification** of acceptance or rejection.
- ♦ **Cancel** the meeting through the Personal Scheduler.
- ♦ **Resolve a schedule conflict** through the Personal Scheduler if a meeting is approved for the same time as a previously scheduled session.

#### Management Tools

A Meeting Approver can do the following (for all meetings or just for a few hosts for whom he or she is the designated approver):

- ♦ View a **list of hosts** for which there is a pending meeting.
- ♦ View the **detail** about a meeting request.
- ♦ **Approve or decline** the request.

**Note:** A Meeting Approver can have approval rights for all meetings or for only those meetings for specific Hosts.

A Meeting Host can do the following:

- ♦ View a list of approved meetings on his or her **Personal Schedule**.
- ♦ Receive **email notification** regarding approved meetings.

Event Managers can do the following:

- ♦ Create a list of **hosts**.
- ♦ View **reports** about meetings, such as the meetings scheduled for each day of your event.

#### Professional Services

Using information you provide, ActiveEvents can:

- ♦ Set up the **rooms and times** in which meetings can be scheduled.
- ♦ Set up **rules for Hosts and Approvers** (such as a topics list for each host, or the hosts for which an approver is allowed to approve meetings).
- ♦ Set up **email notifications** associated with meeting scheduling.
- ♦ Set up **custom fields** that you can use to gather details about each meeting.
- ♦ Configure **login rules** that determine which users are allowed to access the Meetings module.
- ♦ Configure the **maximum number** of meetings each person is allowed to request.
- ♦ Create **custom reports**.

After set up is complete, ActiveEvents can:

- ♦ **Train** Event Managers on how to approve meetings and send or re-send email messages to hosts, approvers, and attendees.

## *One-on-One Meetings (continued)*

### Not Included

For additional cost, some of these items may be possible as custom software updates or as custom services.

#### **Attendee Tools**

Attendees can NOT:

- ◆ Edit a meeting. To change a meeting, the attendee must cancel the meeting and request a new one, or contact an administrator with a change request.

#### **Management Tools**

Meeting approvers can NOT:

- ◆ Schedule a host for multiple meetings at the same time. (The system prevents such conflicts.)
- ◆ Prevent an attendee from scheduling a meeting that conflicts with a session on their Personal Schedule. (The attendees are warned of the conflict but must resolve schedule conflicts on their own.)

#### **Professional Services**

ActiveEvents does NOT:

- ◆ Train attendees on how to request meetings.

## Exhibitor

If you host an expo hall of booths or other exhibits, the exhibiting companies can use an application called the Exhibitor Resource Center to prepare to participate in your event. The ERC also lets you manage event sponsorships or marketing opportunities.

- [Exhibitor and Sponsor Sales](#)
- [Call for Demos](#)
- [Exhibitor Tasks](#)
- [Lead Management](#)

### *Exhibitor and Sponsor Sales*

The Exhibitor Resource Center® (ERC) provides a series of web pages that walk the exhibit owner or sponsor through the sign up process. You can provide different sign up options for different types of exhibitors.

#### Included Features and Services

[Watch Video](#)

##### Exhibitor Tools

To sign up for your event, an exhibit owner can do the following:

- ♦ Create a general company profile, including a brief **description**, **physical address** and **web address**.
- ♦ Enter additional information by completing **custom fields**.
- ♦ Create **user accounts** for key participants (such as a billing contact or booth staff).
- ♦ Designate which user is the **primary owner**.
- ♦ Indicate acceptance of your exhibitor **policy agreement**.
- ♦ Choose a package such as:
  - **Exhibitor** package for companies who host a booth.
  - **Sponsorship** package for those who help fund or support your event.
  - **Marketing opportunity** package for companies who include their logo or marketing literature as part of event advertising.
- ♦ View a **map** of your exhibit hall and indicate their top 3 choices for their **booth** location.
- ♦ Enter **credit card** information to reserve a place. (The card is not charged during registration.)
- ♦ Receive **discounts** based on:
  - Early-bird registration
  - Exhibitor type
  - Answer to a profile question
  - Other custom rule
- ♦ View and **confirm** choices.

##### Management Tools

Your Exhibitor Manager can:

- ♦ **Approve** an exhibitor to participate in your event and assign the appropriate **exhibitor type**.
- ♦ Make **booth** assignments.
- ♦ **Modify** an exhibitor's registration details (such as, edit company information, replace a package with a different one, change answers custom field questions).
- ♦ **Manage payments** (such as charging a credit card, marking a payment as accepted, entering notes or payment terms).
- ♦ Email or print an **invoice**.
- ♦ Complete the **sign-up** process on behalf of an exhibitor.
- ♦ **Cancel** registration and record a refund.
- ♦ View exhibitor data in **reports** such as:
  - Basic exhibitor information
  - Exhibitor payment transactions
- ♦ **Import** new or updated exhibitor data.
- ♦ Send **emails** to exhibitor participants.

##### Professional Services

Using information you provide, ActiveEvents can:

- ♦ Customize the **branding** for your Exhibitor Resource Center site.
- ♦ Create the **categories of data** used in exhibitor records (including exhibitor types, statuses, internal vs. external exhibitors, participant roles, and custom fields).
- ♦ Set up exhibitor **sign up pages** including policy agreement, packages, and payment options.
- ♦ Configure **package rules** such as prerequisites, discounts, and cancellation fee.
- ♦ Create a list of exhibitor **booths** and display the location on a map.
- ♦ Create **custom reports**.
- ♦ Create **import templates**.

After setup is complete, ActiveEvents can:

- ♦ **Train** your Exhibitor Manager on how to manage exhibitor records and the booth map.

## *Exhibitor and Sponsor Sales (continued)*

### Exhibitor Tools

After signing up and being approved exhibitors can log in to the Exhibitor Resource Center (ERC) web site to:

- ◆ Update company information
- ◆ Add or delete participants
- ◆ Register booth staff and other participants who will attend the event.
- ◆ Reserve hotel rooms for attendees (available if you purchased the [Hotel](#) module).
- ◆ Upload files
- ◆ Reserve equipment or other resources to use at the event.
- ◆ Complete other custom tasks

### Management Tools

### Professional Services

#### Not Included

For additional cost, some of these items may be possible as custom software updates or as custom services.

#### Management Tools

Exhibitor Managers can NOT:

- ◆ Send marketing email messages.

#### Professional Services

ActiveEvents does NOT:

- ◆ Train the exhibitors on how to use the sign up site.
- ◆ Create the booth map design. You must provide a graphic image of your expo or exhibit hall.

**Note:** If you let exhibitors pay by credit card, then you must also purchase either [ActiveEvents Merchant Services and Accounting](#) (see page 46) or [Merchant Services Integration](#) (see page 47).

## Call for Demos

The Call for Demos application lets you accept proposals for demo or exhibit booths from your own company. To submit a proposal, the submitter enters information in an online form.

### Included Features and Services

#### Submitter Tools

The people who submit session proposals can:

- ◆ Choose a **demo type** (exhibitor type).
- ◆ Complete general information about the demo including:
  - Name and description
  - Address information
- ◆ Create a **user account** for the primary owner.
- ◆ Complete **custom fields** to provide information about the demo.

As advanced settings, a submitter may also:

- ◆ Enter a **username and password** to access the Call for Demo site.
- ◆ **Volunteer to participate** at your event in a way not tied to a specific demo or booth.

#### Management Tools

Content Managers can:

- ◆ **Activate** or deactivate the Call for Demo site.
- ◆ **Review** the proposed internal demos. (Viewed through exhibitor records.)
- ◆ **Approve** or **reject** demo proposals.

#### Professional Services

Using information you provide, ActiveEvents can:

- ◆ Customize the **branding** for your Call for Demos site. (Same as Call for Papers, if using that site.)
- ◆ Create the **demo type** that can be selected during submission. (Demo type is an internal exhibitor type.)
- ◆ Create the **custom fields** for additional data you may want to gather about demos.
- ◆ Enable the **Volunteer** site if you choose to use that feature.
- ◆ Create **custom reports**.

After set up is complete, ActiveEvents can:

- ◆ **Train** your Exhibitor Manager on how to view and manage demo records.

### Not Included

For additional cost, some of these items may be possible as custom software updates or as custom services.

#### Submitter Tools

Submitters do NOT:

- ◆ Pay a fee.
- ◆ Choose a booth location.
- ◆ Create user records for multiple participants during submission.

If the features above are required for internal demos, use the Exhibitor Sales feature instead. (Sold separately. See [Exhibitor and Sponsor Sales](#) on page 16.)

#### Management Tools

Content Managers can NOT:

- ◆ Vote as a committee on which proposed sessions to accept. (Sold separately. See [Voting](#) on page 10.)

#### Professional Services

ActiveEvents does NOT:

- ◆ Customize branding for individual Call for Papers paths.
- ◆ Train submitters on how to use the Call for Papers application.

## Exhibitor Tasks

After signing up and being approved as an exhibitor, the exhibit owner can complete preparation tasks through the Exhibitor Resource Center® (ERC). You can require different preparation tasks for different types of exhibitors. The owners for internal demos can also complete these tasks.

### Included Features and Services

[Watch Video](#)

#### Exhibitor Tools

Approved exhibitors can complete tasks such as:

- ◆ Update **company information**
- ◆ Add or delete **participants**
- ◆ **Register** booth staff and other participants who will attend the event.
- ◆ **Reserve hotel rooms** for attendees (available if you purchased the [Hotel](#) module).
- ◆ Upload **files**
- ◆ **Reserve equipment** or other resources to use at the event.
- ◆ Complete other **custom tasks**

#### Management Tools

Exhibitor Managers:

- ◆ Configure some pre-defined tasks and create additional **custom tasks**.
- ◆ Identify the **exhibitor type** for which certain tasks must be completed.
- ◆ Identify which **participants** should complete specific tasks (by specifying an exhibitor role).
- ◆ Identify the online page where the person should complete the task:
  - A pre-defined page in the exhibitor record.
  - A page of custom fields.
  - An external web page referenced by URL.
- ◆ **Review completed tasks** and verify that they are completed correctly.
- ◆ Complete the **tasks** on behalf of an exhibitor.
- ◆ View exhibitor data in **reports** such as:
  - Full list of tasks per exhibitor and the completion status.
  - Exhibitor participants who have not yet registered for the event.
  - Schedule for exhibitor participants
  - List of files uploaded by each exhibitor

#### Professional Services

Using information you provide, ActiveEvents can:

- ◆ Create the **categories of data** used in setting exhibitor tasks (such as task types and custom fields)
  - ◆ Use **custom fields** to create custom pages where participants can complete tasks.
  - ◆ Create **custom reports**.
- After set up is complete, ActiveEvents can:
- ◆ **Train** your Exhibitor Manager on how to create and manage tasks.

### Not Included

For additional cost, some of these items may be possible as custom software updates or as custom services.

#### Exhibitor Tools

Exhibitors can NOT:

- ◆ View and report on leads. (Sold separately. See [Lead Management](#) on page 20.)

#### Professional Services

ActiveEvents does NOT:

- ◆ Train the exhibitors on how to complete tasks.

## Lead Management

This module requires [ActiveEvents Leads™](#). The exhibitor uses a lead retrieval unit to scan a bar code on attendee badges. After scanning badges, the exhibitor can manage the lead data using the Lead Management application through the Exhibitor Resource Center® (ERC).

### Included Features and Services

#### Exhibitor Tools

Exhibitors can do the following after scanning leads at an event:

- ◆ Search for people who match a certain criteria, such as:
  - Attendee Type
  - Country
  - Job Title
  - Responses to qualifying questions
  - Custom fields (such as Product Area)
- ◆ Drill down in search results to view **lead details** about an individual, including:
  - Contact information
  - Responses to qualifying questions
  - Notes typed into the scanner
- ◆ Create **lists** of leads grouped by similar criteria.
- ◆ Save search criteria as a **"Smart List."** (Any new people who match the criteria are automatically added to the list.)
- ◆ Send **email** to lists of users through Outlook.
- ◆ **Export** leads to a file:
  - Excel (.xls)
  - Open Office (.ods)
  - Comma Separated Values (.csv)
- ◆ View in **reports** including:
  - Geographic data
  - Qualifying question responses
  - Registration custom field responses.

Advanced:

- ◆ If an exhibitor has more than one scanning device, can view report of leads per device.

#### Professional Services

Using information you provide, ActiveEvents can:

- ◆ Set up **custom fields** to identify the criteria on which exhibitors can search.

### Not Included

#### Exhibitor Tools

Exhibitors can NOT:

- ◆ Manage leads that were captured using a device or method other than [ActiveEvents Leads™](#) lead retrieval.

#### Professional Services

ActiveEvents does NOT:

- ◆ Set up qualifying questions separate from those configured for the [Lead Retrieval](#) device.

## ActiveEvents Connect™ Social Networking

ActiveEvents Connect (also referred to as “Connect”) is a social networking web site where registered attendees can interact with each other and with session speakers and exhibitors before and during an event.

### Included Features and Services

Watch Videos: [Signing-Up](#) | [Using](#)

#### Attendee Tools

A registered attendee can:

- ◆ Create a **personal Connect profile** including a screen name, company information, biography, and personal interests.
- ◆ Create links to their profile on other sites, including **LinkedIn®**, **Facebook**, and their personal **blog**.
- ◆ Search for other attendees, sessions, and exhibitors that **match defined interests**.
- ◆ Send **messages** to other Connect users.
- ◆ Schedule **meetings** with other Connect users
- ◆ Create interest **groups**.
- ◆ Upload **photos**
- ◆ Post **comments** on other users’ profiles or group discussion boards.
- ◆ Read **online help instructions** to find out how to use Connect.

Speakers and exhibitor owners can:

- ◆ Create a **personal profile**.
- ◆ Create a **group**.
- ◆ **Communicate with attendees** who indicate interests in their session or exhibit.

#### Management Tools

An Event Manager can:

- ◆ Add public or private **groups**.
- ◆ Add groups for **featured topics** (such as a group sponsored by an exhibitor).
- ◆ View **content and photos** that users have posted within Connect.
- ◆ **Reject inappropriate photos**.
- ◆ **Disable Connect access** for users who post inappropriate content.
- ◆ Run **reports** related to Connect usage such as:
  - ActiveEvents Connect Activity
  - Meeting Activity
  - Abuse Report
  - Photo Review Report

#### Professional Services

Using information you provide, ActiveEvents can:

- ◆ Customize the **branding** for your Connect site.
- ◆ Create the **custom fields** you want to use to match attendees, sessions, and exhibitors.
- ◆ Configure **rules** that control who can access Connect (based on attendee type, registration package, custom field settings, etc.).
- ◆ Configure **preferences for meetings** scheduled through Connect (rooms where meetings can be held, duration of meetings allowed, etc.).
- ◆ Create **custom reports** for reviewing custom field data.

After set up is complete, ActiveEvents can:

- ◆ **Train your Event Manager** on how to create groups, review content and photos, deactivate users who post inappropriate content.

### Not Included

For additional cost, this item may be possible as a custom service.

#### Professional Services

ActiveEvents does NOT:

- ◆ Train attendees, speakers, or exhibitors on how to use Connect.

## Surveys

ActiveEvents Conference lets you create and manage surveys. You can create surveys about sessions or about your event in general.

### Included Features and Services

#### Attendee Tools

Attendees can:

- ◆ Access surveys in one of these ways, depending on your implementation:
  - Logging in to the [Session Catalog and Personal Scheduler](#).
  - Scanning a barcode or logging in at the [Cyber Café Kiosk](#).
  - Clicking a link in an email (for anonymous event surveys).
- ◆ Answer questions about **sessions** after attending a session.
- ◆ Answer questions about the **event** in general.

#### Management Tools

Event Managers can:

- ◆ Create **event surveys**:
  - Create custom questions to gather opinions about your event.
  - Use custom fields to identify which users have access to the survey.
  - Make a survey anonymous.
- ◆ Create **session surveys**:
  - Create custom questions to gather opinions about sessions.
  - Create surveys for each session type or each individual session.
  - Create surveys associated with a certain custom field.
- ◆ **Publish** or **unpublish** surveys.
- ◆ View **reports** for each survey, such as this data:
  - Total number of people who completed the survey.
  - The number and percentage of people who chose a specific response.
  - Average rating for each response.
  - The unique responses entered into text boxes.

#### Professional Services

Using information you provide, ActiveEvents can:

- ◆ Create **custom fields** that are used to grant access to specific surveys.
- ◆ Configure the location where surveys display:
  - Cyber Café Kiosk
  - Session Catalog and Personal Scheduler

After set up is complete, ActiveEvents can:

- ◆ **Train** your Event Manager or Content Manager on how to create survey questions and view survey responses.

### Not Included

For additional cost, some of these items may be possible as custom software updates or as custom services.

#### Attendee Tools

Attendees can NOT:

- ◆ Print out a survey to complete it on paper.
- ◆ Print their survey responses.

#### Management Tools

Event Managers can NOT:

- ◆ View results for different surveys in the same report.

#### Professional Services

ActiveEvents does NOT:

- ◆ Train attendees on how to complete surveys.

## Web Analytics

Web Analytics tools help you measure the effectiveness of your marketing programs and your event sales web sites. You can track the Web traffic to your attendee registration sales sites in general, or even view the access rate for specific pages.

### Included Features and Services

[Read More](#)

#### Management Tools

Event Managers can:

- ◆ Track the success of a variety of **event marketing activities**:
  - Email
  - Sponsorships
  - Web banner ads
  - Direct Mail
  - Telemarketing
- ◆ View **Web site traffic**.
- ◆ **Analyze web site visitors** by a variety of criteria such as:
  - Attendee type
  - Registration code
  - Geographic location
  - User profile data (custom fields)
- ◆ Use funnel analysis to identify which **pages in registration** are tied to a drop-off in registrants (such as the package selection page).
- ◆ Use real-time reports to make mid-stream adjustments on-the-fly.

#### Professional Services

ActiveEvents can do the following:

- ◆ Help you define the specific **Registration pages** for which you want to track activity.
- ◆ Integrate your Registration site with industry-leading Ominture® SiteCatalyst® **Web analytics tools**.
- ◆ Insert a small snippet of code to track all Web site traffic and store the **marketing campaign ID** that brought the visitor to the site.
- ◆ Tag web pages to show **visitor data** (individual visits as well as overall traffic and trends for your site).
- ◆ An ActiveEvents Analytics Consultant will **analyze the data** to provide insight on which website elements were successful and point out opportunities for improved exposure.
- ◆ **Edit Registration Paths** based on report analysis (such as revising user profile questions).

### Not Included

For additional cost, some of these items may be possible as custom software updates or as custom services.

#### Management Tools

Event Managers can NOT:

- ◆ Track marketing activities or web site traffic for exhibit or sponsorship sales.

#### Professional Services

ActiveEvents does NOT:

- ◆ Analyze exhibitor, session, or survey data.

## Administration and Reporting Tools

The Administrator Tool is a web site where event managers can view and update data related to an event. This section lists the features that help you manage data in all modules or across modules. (Management Tools related to specific modules are listed explained in the section for that module.)

### Included Features and Services

#### Management Tools

Event managers can:

- ◆ Access management for all modules in a **single web interface**.
- ◆ Add **user accounts** for other event managers and assign appropriate security roles.
- ◆ Search for attendee, session, or exhibitor records using an **integrated search tool**.
- ◆ View a summary of report data in a **dashboard**.
- ◆ Use **reports**:
  - Access system-provided reports or custom-built reports to view detailed event data.
  - Schedule reports to automatically be sent to specified email addresses on various schedules.
- ◆ Send **email messages** to communicate with attendees, speakers, exhibitors, or event managers:
  - Send system-provided email messages.
  - Create custom-built email messages.
  - Use variables to insert unique data for each recipient.
  - Customize the message for a specific attendee type or for users who have a certain custom field value.
  - Attach files to a message.
- ◆ **Import** records or other data, such as:
  - User accounts and user schedules.
  - Session data
  - Exhibitor data.
  - Custom field data
  - Registration code data
  - Standard company names
  - Exhibitor leads

#### Professional Services

ActiveEvents can do the following:

- ◆ Set up, install, and maintain your **event database and all web applications**.
- ◆ Configure **security roles** so your event managers and staff have access only to the areas of the Administration Tool they are responsible for.
- ◆ Help you set up **custom reports** so you can easily report on the data that is of most interest to your organization.
- ◆ Configure an **email template** to include your custom branding.
- ◆ **Train** your event managers on how to use reports and email messaging.
- ◆ Create **import templates**.

### Not Included

For additional cost, some of these items may be possible as custom software updates or as custom services.

#### Management Tools

Event Managers can NOT:

- ◆ Manage event logistics

#### Professional Services

ActiveEvents does NOT:

- ◆ Display your logo or branding in the Administration Tool. (However, you can choose a primary color to display in the Administration Tool.)

## On-Site Tools

On-site Tools are combined hardware & software systems that help you manage the activities at your event. The available on-site systems include:

- ◆ [Check-in and Badging](#)
- ◆ [Instant Schedule Printing](#)
- ◆ [Cyber Café Kiosk](#)
- ◆ [Gift and Materials Distribution](#)
- ◆ [ActiveEvents Leads™](#)
- ◆ [Session Access Control](#)
- ◆ [On-site Server Cluster](#)

If ActiveEvents provides any of the above on-site tools or services for your event, some general guidelines apply (as explained in [On-site Resources Not Provided](#) on page 33).

### Check-in and Badging

Self-service Check-In kiosks let registered attendees quickly and easily check-in and print their badges.

As part of Check in, an Onsite Application System (OASYS) is deployed. OASYS includes a duplicate of registration and attendee data from your ActiveEvents Conference database. If the Internet goes down and the connection to the Conference server is lost during your event, OASYS guarantees that attendees can continue checking-in without interruption. After connectivity returns, OASYS synchronizes any new or changed data with your main Conference Administration database.

#### Included Hardware, Features and Services

[Watch Video](#)

##### Hardware

ActiveEvents can provide rental of:

- ◆ Laptop computer for **Check-in stations**.
- ◆ Laptop computer for **Assisted Checkin stations**.

In nearly all cases, ActiveEvents provides rental of the **OASYS stations**. (An exception may be international events.)

##### Attendee Tools

Attendees can:

- ◆ **Check in** by searching for his or her name at a self-service check-in station.
- ◆ **Edit the first name** displayed on the badge.
- ◆ **Print the badge and pick it up** at a location that displays on the check-in screen.

Advanced features:

- ◆ Answer additional **custom field questions** during check-in.
- ◆ Take a **photo** (via web camera) to show on the badge.
- ◆ Receives their **session schedule** printed on their badge. (Instead, the schedule may be printed at an [Instant Schedule Printing station](#).)

##### Management Tools

Registration Managers can:

- ◆ **Assist attendees** during the check-in process.
- ◆ **Accept and record payments**.
- ◆ **Register new attendees on-site**.

Advanced features:

- ◆ **Pre-print badges** before the event. (Not recommended.)

##### Professional Services

ActiveEvents can do the following.

To prepare for the event:

- ◆ **Configure and test custom badge rules and badge text layout**.
- ◆ **Configure and test check in rules** (such as which attendees receive a certain badge holder, lanyard, or tickets to special events, etc.).
- ◆ **Configure the OASYS stations**.
- ◆ If stations are locked down with Kiosk, **stages Check-in stations** rented from ActiveEvents or **provides an image** for you to stage your own stations.

At the event:

- ◆ **Sets up hardware** rented from ActiveEvents.
- ◆ **Configures the badge print server** on OASYS to print to your printers.
- ◆ **Test check-in, OASYS connectivity, and badge printing**.

## Check-in and Badging (continued)

### Hardware

### Attendee Tools

### Management Tools

### Professional Services

- ◆ Check-in at **satellite location** (such as a hotel or the exhibit hall).

After the event ends:  
Takes down hardware rented from ActiveEvents.

## Not Included

### Hardware & Materials

ActiveEvents does NOT provide:

- ◆ Printers for printing badges.
- ◆ Web camera for capturing badge photo (unless specifically contracted to do so).
- ◆ Badge stock. (Sold separately. See [Badges](#), [Badge Holders](#), & [Lanyards](#) on page 48.)

### Attendee Tools

Attendees can NOT:

- ◆ Change their last name or email address during check in.

### Professional Services

ActiveEvents does NOT:

- ◆ Set up and take down the check in machines nightly.
- ◆ Provide security for check in machines left unattended.
- ◆ Hand out badges or replenish the badge stock in printers (unless specifically contracted to do so).

## Instant Schedule Printing

Instant Schedule Printing prints out a schedule after an attendee scans his or her badge.

### Included Features and Services

#### Hardware

ActiveEvents can provide rental of Schedule Printing stations including:

- ◆ Computer
- ◆ Barcode reader

#### Attendee Tools

After arriving at your event, registered attendees can do the following:

- ◆ Scan the barcode on their badge.
- ◆ Pick up their session schedule from a printer.

#### Management Tools

None needed. Attendees pick up their schedule from a printer without needing assistance.

#### Professional Services

ActiveEvents can do the following.

To prepare for the event:

- ◆ Set up the schedule (as explained in [Session Catalog and Personal Scheduler](#) on page 13).
- ◆ Verify that attendee badges include the correct 1D barcode required for scanning.

At the event:

- ◆ Set up and configure Schedule Printing stations.
- ◆ Test schedule printing.

After the event ends:

- ◆ Take down print stations provided by ActiveEvents.

### Not Included

#### Hardware & Materials

ActiveEvents does NOT provide:

- ◆ Rental of printers.
- ◆ Printer paper.

#### Attendee Tools

Attendees can NOT:

- ◆ Modify their schedule.

#### Professional Services

ActiveEvents does NOT:

- ◆ Set up or take down hardware that ActiveEvents does not provide (unless contracted to do so).
- ◆ Setup printers.
- ◆ Set up and take down the stations or printers nightly.
- ◆ Provide security for machines left unattended.

## Cyber Café Kiosk

The Cyber Café Kiosk is a combined hardware software solution that lets your attendees access event resources while on-site at your event.

### Included Features and Services

#### Hardware

ActiveEvents can provide rental of Kiosk stations including:

- ◆ Computer
- ◆ Monitor
- ◆ Barcode reader

**Note:** If you provide your own Kiosk computers, they must run the Windows XP operating system.

#### Attendee Tools

After arriving at your event, registered attendees can do the following at a Cyber Café Kiosk:

- ◆ Scan a barcode or enter a username and password to **log in**.
- ◆ View a **daily message** from your event management staff.
- ◆ View and print his or her **schedule**.
- ◆ View and respond to on-line **surveys**. (Sold separately. See [Surveys](#) on page 22.)
- ◆ Access **ActiveEvents Connect**. (Sold separately. See [ActiveEvents Connect](#) on page 21.)

#### Management Tools

Event Managers can: To prepare for the event:

- ◆ Create and publish event or session **surveys**. (Sold separately. See [Surveys](#) on page 22.)

At the event:

- ◆ Write **daily announcements** or other messages that display on the Kiosk.

After the event ends:

- ◆ View survey reports.

#### Professional Services

ActiveEvents can do the following.

To prepare for the event:

- ◆ Customize the **branding** for the Kiosk user interface.
- ◆ Configure **rules** that determine which attendees see which surveys. (Sold separately. See [Surveys](#) on page 22.)
- ◆ Set up the Kiosk to point to **ActiveEvents Connect**. (Sold separately. See [ActiveEvents Connect](#) on page 21.)
- ◆ **Configure and test hardware** (or create and test a configuration image for you to use to stage your own hardware).
- ◆ Verify that attendee badges include the correct **1D barcode** required for kiosk scanning.

At the event:

- ◆ Set up and test **Kiosk stations**.

After the event ends:

- ◆ **Take down** the Kiosk stations provided by ActiveEvents.

### Not Included

#### Hardware & Materials

ActiveEvents does NOT provide:

- ◆ Rental of printers.
- ◆ Printer paper.

#### Attendee Tools

Attendees can NOT:

- ◆ Print out surveys.

#### Professional Services

ActiveEvents does NOT:

- ◆ Set up and take down machines that ActiveEvents does not provide.
- ◆ Set up and take down the kiosk machines nightly.
- ◆ Provide security for kiosk machines left unattended.

## Gift and Materials Distribution

Gift & Materials Distribution is a combined hardware software solution that lets attendees pick up gifts or materials at your event. For example, you may want to distribute T-shirts, backpacks, and marketing literature.

### Included Features and Services

#### Hardware

ActiveEvents can provide rental of Gift Redemption stations including:

- ◆ Computer
- ◆ Monitor
- ◆ Barcode reader

#### On-site Staff Tools

Gift Redemption staff can:

- ◆ Scan an attendee's badge.
- ◆ View a list of gifts or materials the attendee is authorized to receive, including a photo of the gift.
- ◆ Hand out the items to attendee.

The system records that attendee received item.

#### Management Tools

Event Managers can:

- ◆ Provide images the gifts or materials to be distributed.

#### Professional Services

ActiveEvents can do the following using information that you provide.

To prepare for the event:

- ◆ Create a list of gifts and materials, including a photo of each item.
- ◆ Identify the rules that allow certain attendees to receive specific gifts.
  - Attendee type
  - Completing a survey
  - Other custom rule
- ◆ Configure and test hardware (or create and test a configuration image for you to use to stage your own hardware).
- ◆ Verify that attendee badges include the correct 1D barcode required for gift scanning.

At the event:

- ◆ Setup and configure the Gift stations.

After the event ends:

- ◆ Take down the Gift stations provided by ActiveEvents.

### Not Included

#### Professional Services

ActiveEvents does NOT:

- ◆ Set up and take down machines that ActiveEvents does not provide.
- ◆ Provide on-site staff to distribute the Gifts (unless specifically contracted to do so).
- ◆ Set up and take down the Gift stations nightly.
- ◆ Provide security for Gift stations left unattended.

## ActiveEvents Leads™

If you use the [Exhibitor](#) module in ActiveEvents Conference, ActiveEvents can provide rental of lead retrieval scanning units to your exhibitors.

### Included Features and Services

[Read More](#)

#### Hardware

ActiveEvents can provide **rental of lead retrieval units** for exhibitors including:

- ◆ Blackberry OR Bartizan
- ◆ Printer

#### Exhibitor Tools

Exhibitors can do the following.

Before the event:

- ◆ Log into a web application to **order and pay** for rental of **lead retrieval units**.
- ◆ Order **custom qualifying questions** to be configured on the unit (for an extra fee).

During the event:

- ◆ **Scan barcodes** of attendees who visit their booth.
- ◆ **Print** to paper limited data for each lead (if printer is rented).
- ◆ **Upload leads** to a web application.

After the event:

- ◆ **View leads** in the web application.
- ◆ **Export leads** to Excel or other file.

#### Professional Services

ActiveEvents can do the following.

To prepare for the event:

- ◆ Give you PDF documentation that you can use to **market Lead Management** to your exhibitors.
- ◆ **Manage orders** and payments for rental of lead retrieval units.
- ◆ Configure lead retrieval units.
- ◆ Set up **qualifying questions** for specific exhibitors.
- ◆ Verify that attendee badges include the correct **2D barcode** required for lead scanning.

At the event:

- ◆ Distribute **lead retrieval units** to your exhibitors.
- ◆ Provide **printed instructions** on how to use the unit.
- ◆ As needed, help exhibitors **upload leads**.

After the event ends:

- ◆ **Verify** that leads were uploaded correctly.

### NOT Included

#### Exhibitor Tools

Exhibitors can NOT:

- ◆ Find specific leads by entering search criteria and send email to leads through an application. (Sold separately. See [Lead Management](#) on page 20.)

#### Professional Services

ActiveEvents does NOT:

- ◆ Provide security for lead retrieval units left unattended.

## Session Access Control™ (SAC)

Session Access Control (SAC) lets you track or control which people attend which sessions. A SAC workstation is placed at the entrance to the session room. Each attendee's badge is scanned before he or she is allowed to enter the room. Entrance is allowed or denied based on your business rules.

### Included Features and Services

#### Hardware

ActiveEvents can provide rental of SAC stations including:

- ◆ Computer
- ◆ Monitor
- ◆ Barcode reader

#### On-site Staff Tools

Session Access Control staff can:

- ◆ Scan an attendee's badge.
- ◆ View a green, red, or yellow indicator that signals whether the attendee is allowed entrance, not allowed, or must wait to be admitted.

As advanced settings, a SAC staff member can:

- ◆ Manually force an upload and download of data.
- ◆ Override a red or yellow indicator and admit an attendee.
- ◆ Display standard session information including speaker, title, start time, and seats remaining.
- ◆ Display sponsorship logos or announcements.

#### Management Tools

Event Managers can:

- ◆ View reports about session attendance.

#### Professional Services

ActiveEvents can do the following.

To prepare for the event:

- ◆ Help you identify which sessions and rooms require access control.
- ◆ Help you define the rules that allow or deny admittance to sessions.
- ◆ Use your rules to configure the software on SAC machines.
- ◆ Verify that attendee badges include the correct 1D barcode required for SAC scanning.

At the event:

- ◆ Place and configure SAC machines at required rooms.
- ◆ Provide training to the on-site staff who use SAC to scan badges at session entrances.
- ◆ Monitor SAC machines throughout the event to make sure data is being uploaded or downloaded appropriately.

After the event ends:

- ◆ Take down the SAC stations provided by ActiveEvents.

### Not Included

#### Hardware

ActiveEvents does NOT provide:

- ◆ Hard-wired networking.

**Note:** ActiveEvents strongly recommends a 24/7 hard-wired network connection for each SAC workstation instead of a wireless connection.

#### Professional Services

ActiveEvents does NOT:

- ◆ Provide the SAC staff on-site.
- ◆ Set up and take down the SAC machines nightly.
- ◆ Provide security for SAC machines left unattended.

## On-Site Server Cluster

If you host a very large event, ActiveEvents can deploy an on-site server cluster at your event to provide. The server cluster allows for fast access to ActiveEvents Conference applications and isolates your applications from Internet problems during your event.

**Note:** A Senior Platform person from ActiveEvents is required to travel to the event to manage the cluster.

### Included Hardware and Services

#### Hardware

ActiveEvents can provide:

- ◆ One or more ActiveEvents application servers.
- ◆ Full database support to run your application.
- ◆ Firewall to protect the application servers and data server.
- ◆ Network Switches and cabling required to link the servers to the venue infrastructure.
- ◆ Uninterrupted Power Supply (UPS) to provide protection from brown outs and short term power outages (8-10 minutes)

#### Professional Services

ActiveEvents can do the following.

To prepare for the event:

- ◆ Test the cluster to ensure it can handle the anticipated usage.
- ◆ Work with the venue/client network team to ensure proper location, connectivity and power requirements are met.
- ◆ Ship the cluster to the event venue.

At the event:

- ◆ Deploy the on-site server.
- ◆ Migrate data and sites from the pre-event location to the servers at the venue.
- ◆ Maintain server throughout the event to ensure quick access to data.
- ◆ Monitor the sites remotely to ensure global availability.

After the event ends:

- ◆ Transition data acquired during the event back to the permanent hosting facility.
- ◆ Pack and ship the cluster from the venue.

### Not Included

#### Hardware

ActiveEvents does NOT provide:

- ◆ Servers for any other functions.
- ◆ Network infrastructure or internet connectivity for your event in general.
- ◆ Protection against the failure of the in-house network outside of the registration area.

#### Professional Services

ActiveEvents does NOT:

- ◆ Provide code customizations on-site (unless specifically requested and documented as [Software Customization](#) or [Integration](#) services).

## ***On-site Resources Not Provided***

ActiveEvents does not provide all the items and resources that are required to ensure a successful on-site experience. This section lists some specific items that ActiveEvents does not provide, which you must provide for your own event. It also lists resources that you must provide to support the services that ActiveEvents will provide.

### **ActiveEvents does NOT provide:**

- ◆ PC workstation hardware, servers, and network gear *except* as specifically contracted for individual on-site tools supplied by ActiveEvents (such as rental of Check-in laptops).
- ◆ On-site network services including network backbone, network equipment, technical support, wireless network, Internet access, etc., *except* as provided for in the cost estimate section.
- ◆ Furniture or signage of any kind.
- ◆ Event management services.
- ◆ Physical security of the machines used to deliver on-site services such as Session Access Control (SAC), Check In, Cyber-Cafe, and Lead Management. ActiveEvents also does not provide daily setup and teardown of these machines.
- ◆ On-site PC services including setting up or taking down Check In workstations; setting up, managing, or taking down SAC workstations; and manual daily updates of SAC workstations; etc., *except* as provided for in the cost estimate section.

### **Your company must provide to ActiveEvents:**

- ◆ Sample of PC so ActiveEvents can create an image (unless you rent hardware from ActiveEvents).  
The image includes the software and the configuration for the Cyber Café Kiosk, Gift and Materials Distribution, and Session Access Control. If you want the Checkin workstation locked down to prevent attendees from accessing other programs in the laptop, the Checkin workstations must be configured with the image; otherwise, any laptop with a browser is fine and no image is required.
- ◆ A secure, private workroom with internet connectivity for ActiveEvents on-site infrastructure and staff. This workroom must have adequate electrical power.
- ◆ If an [On-Site Server Cluster](#) is provided, a dedicated 20 amp circuit with at least 2 outlets must be provided in a secure, lockable room.
- ◆ Access to event facilities sufficient to enable ActiveEvents to perform its duties.
- ◆ Authorized payment or other attendance approval representative, for attendees who arrive on-site and wish to attend before payment for their attendance has cleared or without making payment for other reasons.

## Additional Professional Services

ActiveEvents can provide the following services to help you complete the goals of your event.

### Software Implementation:

- ◆ [Software Customization or Integration](#)
- ◆ [System Architecture](#)
- ◆ [Web Site Hosting and Management](#)
- ◆ [Extended Application Hosting](#)
- ◆ [Software Training](#)

### Management:

- ◆ [Registration Management](#)
- ◆ [Hotel Management](#)
- ◆ [Content Management](#)
- ◆ [Exhibitor Management](#)

### Attendee Registration Support:

- ◆ [Registration Call Center Support](#)
- ◆ [On-site Registration Help Desk Staff](#)

### Financial Services:

- ◆ [ActiveEvents Merchant Services and Accounting](#)
- ◆ [Merchant Services Integration](#)

### Materials Ordering:

- ◆ [Badges, Badge Holders, Lanyards & Ribbons](#)

## ***Software Customization or Integration***

All ActiveEvents Conference software modules include a full set of features that work together to help you successfully plan and manage your event. In some cases to meet your specific business needs, you may want to customize the software or integrate it with a third-party product.

When customizations or integrations are requested, ActiveEvents provides the following services:

### **Included Services**

#### **Professional Services**

A Business Analyst will:

- ◆ Interview you to find out the details for your requested customization.
- ◆ Write a description of the customization and the estimated cost.
- ◆ Have you sign your approval before work begins.
- ◆ Assist with testing when coding is complete.

The Software Development Team will:

- ◆ Complete coding according to the written description.
- ◆ Test and resolve any errors that are identified.

Your Project Manager will:

- ◆ If you request multiple customizations, help you prioritize your list of customizations and manage the timeline.
- ◆ Notify you when custom code is ready for you to test.
- ◆ Have you sign your acceptance when the customization is complete and working as designed.

**Note:** In addition to customizations per module, you may pay for a custom software developer to travel to your event to perform on-site deployment changes as needed.

### **Not Included**

#### **Professional Services**

ActiveEvents does NOT:

- ◆ Create custom software without receiving written approval to do so.
- ◆ Make custom code available for you to test more frequently than once a week during your implementation phase.

## *System Architecture*

If you are planning a large or complex event, ActiveEvents can provide the services of a System Architect who can help you best plan your software implementation using industry best practices.

### Included Services

#### Professional Services

ActiveEvents can do the following.

- ◆ Evaluate your business requirements and map them to features available in the base software.
- ◆ Help architect process workflows (such as registration path flows and the workflow between different modules).
- ◆ Provide advanced consulting services for initial and ongoing event setup.
- ◆ Oversee software customization design and analysis.
- ◆ Help decide how each module is deployed.
- ◆ Plan any integration with outside databases.

## ***Web Site Hosting and Management***

To assist you with your event marketing, ActiveEvents can host and manage your event web site.

### **Included Services**

#### **Professional Services**

ActiveEvents can do the following:

- ♦ Implement, host, and maintain static web sites that support your event.
- ♦ Incorporate your content to create static and dynamic pages as needed to create your event marketing web site.
- ♦ As requested, may provide HTML development, graphic design, style sheets, rollover effects, navigations, and/or Flash animation.

### **Not Included**

#### **Professional Services**

ActiveEvents does NOT:

- ♦ Write the content that is included on the static web sites.
- ♦ Keep the site hosted for an unlimited time. (The hosting period is specified in your Statement of Work.)

## ***Extended Application Hosting***

Standard application hosting is provided with your ActiveEvents Conference software license from your Project Kick-Off date to 1 month after the end of your event. If desired, you can purchase extended hosting for an additional monthly fee.

### **Included Services**

#### **Professional Services**

ActiveEvents can provide the following:

- ◆ Housing of ActiveEvents Conference software applications in managed datacenter during the event
- ◆ Server rental
- ◆ Datacenter space
- ◆ Managed backups
- ◆ Patch and security management

## ***Software Training***

Training for Management tools are usually provided with each module purchased. (For example, if you are using the Attendee Registration module, your Business Analyst can use budgeted hours to train your Registration Manager on how to view and update registration details in the attendee's user accounts.)

If desired, you can purchase additional training.

### **Included Services**

#### **Professional Services**

ActiveEvents can provide the following:

- ♦ Custom training on topics to meet your event or team needs.
- ♦ Training at your company's location, at ActiveEvents offices, or online.
- ♦ An instructor (your Business Analyst) who understands your project and unique business rules.

For example, if you plan to do your own set up, you might want to be trained on topics such as these:

#### **Registration Setup Training**

Learn advanced skills in registration code design, registration path setup, pricing discount structures, hotel setup, and access to content based on codes

#### **Content Setup Training**

Learn advanced skills in Call for Papers setup, addition of custom fields, committee voting, Speaker Resource Center setup with participant and session tasks, approval tracks for session details and documents, Session Access Control planning and management, 1-on-1 meeting setup and management, and reporting

#### **Exhibitor Setup Training**

Learn advanced skills in the setup of exhibit sales, custom field additions, workflow structure for tasks, booth map layout, and reporting

#### **General System Administrator Training**

Learn to manage all aspects of the Conference software applications including email, security roles, data imports/exports, custom fields, reporting, and business rules management.

### **Not Included**

#### **Professional Services**

ActiveEvents does NOT:

- ♦ Pay for travel expenses associated with training trips.

## ***Registration Management***

If you use any [Registration](#) module in ActiveEvents Conference, ActiveEvents can provide Registration Management services to help you create and manage your session records, speakers, and session schedule.

### **Included Services**

#### **Professional Services**

ActiveEvents can do the following before the event:

- ◆ Help your event team identify your project requirements for attendee registration.
- ◆ Configure the Attendee Registration software according to your business rules.
- ◆ Create registration codes.
- ◆ Consult with the Business Analyst on custom development requirements, when needed.
- ◆ Run reports to find registration counts, summary of packages purchased, etc.

ActiveEvents can do the following at the event:

- ◆ Help your event management team manage on-site registration operations, including satellite registration.
- ◆ Help you manage and train your temporary registration staff.

ActiveEvents can do the following after the event ends:

- ◆ Run reports.

### **Not Included**

#### **Professional Services**

ActiveEvents does NOT:

- ◆ Talk directly to your attendees and update registration details in user accounts. (Sold separately. See [Registration Call Center Support](#) on page 44.)
- ◆ Work at the Registration Desk at your event. (Sold separately. See [On-site Registration Help Desk Staff](#) on page 45.)

## *Hotel Management*

If you use the [Hotel Registration](#) module in ActiveEvents Conference, ActiveEvents can provide Hotel Management services to help you manage the hotel reservations for your event.

### Included Services

#### Professional Services

ActiveEvents can do the following before the event:

- ◆ Identify rules for hotel sub-blocks.
- ◆ Enter contract amounts for each hotel room on specific dates, and identify which users are eligible to reserve a room for those nights.
- ◆ Serve as the liaison between you and the hotel management staff.
- ◆ Manage hotel attrition rates and room block adjustments.
- ◆ Send reports to the hotel manager, including changes and deletions.

## *Content Management*

If you use any [Content](#) module in ActiveEvents Conference, ActiveEvents can provide Content Management services to help you create and manage your session records, speakers, and session schedule.

### Included Services

#### Professional Services

ActiveEvents can do the following before the event:

- ◆ Helps your event team identify your project requirements for content (including sessions, speakers, and scheduling).
- ◆ Manages content setup and implementation within the ActiveEvents Conference software program.
- ◆ Manages session room blocking and schedule creation.
- ◆ Assists with setup and management of Speaker Resource Center.
- ◆ Assists with session and event survey creation and deployment. (Surveys are sold separately. See [Surveys](#) on page 22.)
- ◆ When needed, consults with the Business Analyst on custom development requirements.
- ◆ Oversees the ActiveEvents project team for content-related activities.
- ◆ Runs content reports.
- ◆ Assists speakers and other session participants as they complete tasks in the Speaker Resource Center.

ActiveEvents can do the following at the event:

- ◆ Helps your event team manage on-site content and speaker-related activities.
- ◆ Facilitates on-site content changes, such as room and speaker changes.
- ◆ Manages session access control and attendance monitoring. (Session Access Control is sold separately. See [Session Access Control](#) on page 31.)

ActiveEvents can do the following after the event ends:

- ◆ Run reports.

## *Exhibitor Management*

If you use any [Exhibitor](#) module in ActiveEvents Conference, ActiveEvents can provide Exhibitor Management services to help you manage the exhibitors and sponsors for your event.

### Included Services

#### Professional Services

ActiveEvents can do the following before the event:

- ◆ Helps your event team identify your project requirements for exhibitors and sponsors (including exhibit booths, purchase items, pricing, and exhibitor preparation tasks).
- ◆ Manages exhibitor / sponsor setup and implementation with the Conference software program.
- ◆ Manages exhibitor sales and registration.
- ◆ When needed, consults with the Business Analyst on custom development requirements.
- ◆ Oversees the ActiveEvents project team for exhibitor-related activities.
- ◆ Manages sales to exhibitors and sponsors.
- ◆ Manages exhibitors and other participants as they complete tasks in the Exhibitor Resource Center (ERC).
- ◆ As necessary, updates exhibitor and participant records in the Conference Administrator Tool on behalf of exhibitors.
- ◆ Coordinates exhibit booth assignments.
- ◆ Runs exhibitor reports.

ActiveEvents can do the following at the event:

- ◆ Help your team manage on-site exhibitor-related activities.
- ◆ Assists exhibitors with any on-site issues and changes.
- ◆ Assists exhibitor booth staff with any on-site registration and badge issues.

ActiveEvents can do the following after the event ends:

- ◆ Run reports.

## Registration Call Center Support

If you purchase the [Attendee Registration](#) module, you can contract with ActiveEvents to provide customer support to registering attendees before your event.

### Included Services

#### Professional Services

ActiveEvents Call Center staff can do the following:

- ◆ Understand the unique registration setup and **rules** for your event (including attendee types, packages, and discounts) and apply those rules as needed when attendees request help.
- ◆ Answer attendee questions over the **phone** or through **email**.
- ◆ Provide support in the **English** language.
- ◆ Use the Registration Management tools to **update attendee records and registration data** as needed, including:
  - Update attendee contact information and profile responses.
  - Retrieve or change login information.
  - Email an invoice to the registrant.
  - Record a payment.
  - Apply a discount.
  - Apply a refund.
  - Replace a package order with a different order.
  - Update the guests for a guest package.
  - Cancel a package order.
  - Add or change a hotel reservation (if the [Hotel](#) module is purchased).
  - Assist with scheduling sessions (if the [Scheduler](#) module is purchased).

ActiveEvents provides the above services **Monday through Friday** during the following hours:

- ◆ US events - Your choice of 7:00am to 5:00pm OR 8:00am to 6:00pm (Mountain Time)
- ◆ EMEA events - 8:00am to 6:00pm (Greenwich Mean Time)

ActiveEvents also provides:

- ◆ A **unique in-bound phone number** for your event. This number is toll free for US-based events.
- ◆ **Monthly reports** detailing your event's statistics for incoming calls, including this data:
  - Calls presented
  - Calls answered
  - Average time to answer
  - Average time spent on a call
  - Maximum call time
  - Abandoned calls
  - Average time to abandon
  - Maximum time to abandon

### Not Included

For additional cost, some of these items may be possible as custom services.

#### Professional Services

ActiveEvents does NOT:

- ◆ Provide 24-hour support.
- ◆ Provide weekend support.
- ◆ Send out payment reminders.
- ◆ Serve as a collection agency. (Do not pursue unpaid attendee accounts.)
- ◆ Provide support to session speakers or exhibitors who complete tasks in the Speaker Resource Center (SRC) or Exhibitor Resource Center (ERC), except to answer their questions about registration.

## *On-site Registration Help Desk Staff*

If you purchase the [Attendee Registration](#) module, you can contract with ActiveEvents to help your attendees at your event.

### Included Services

#### Professional Services

ActiveEvents can do the following at your event:

- ◆ Assist attendees with registration and check-in issues.
- ◆ Provide assistance with on-site payments, order transfers, and other registration changes.
- ◆ If you purchased the Gift and Materials Distribution module, may distribute gifts and materials. (For details, see [Gift and Materials Distribution](#) on page 29.)

### Not Included

For additional cost, this item may be possible as a custom service.

#### Professional Services

ActiveEvents does NOT:

- ◆ Provide temporary staff to hand out badges, unless specifically contracted to do so.

**Note:** If ActiveEvents provides On-site Registration Help Desk Staff, your organization must provide an authorized payment or other attendance approval representative, for attendees who arrive on-site and wish to attend before payment for their attendance has cleared or without making payment for other reasons.

## ***ActiveEvents Merchant Services and Accounting***

If attendees and exhibitors pay to participate in your event, ActiveEvents can provide merchant services for credit card transactions and accounting services for several payment types.

**Note:** ActiveEvents charges you fees for these services on a per-transaction basis. These fees are deducted from revenues collected. (See your Statement of Work for details.)

### **Included Services**

#### **Professional Services**

ActiveEvents can do the following:

- ◆ Collect and process credit card, check, and wire transactions.
- ◆ Collect event funds from attendees and/or exhibitors using the ActiveEvents (Active Network) bank and merchant account.
- ◆ Record check and wire transfer payments in user and exhibitor records within the ActiveEvents Conference Administrator tool.
- ◆ Use reasonable efforts to collect payments due for the event. Collection efforts are limited to email messages and phone calls to those attendees and exhibitors who have overdue payments.
- ◆ Reconcile funds and sends a detailed reconciliation report to your accounting department each month. (This report is sent on the 15<sup>th</sup> of each month with details from the previous month.)
- ◆ Transfer funds to your bank account monthly. (Funds are transferred on the 15<sup>th</sup> after your reconciliation report is prepared. Fund transfers may occur less frequently at the client's request.)

### **Not Included**

#### **Professional Services**

ActiveEvents does NOT:

- ◆ Serve as a collection agency. (Does not pursue unpaid attendee or exhibitor accounts beyond an initial email and phone reminder about overdue payments.)
- ◆ Send a reconciliation report more frequently than once a month.
- ◆ Transfer funds more frequently than once a month.

**Note:** If you choose to use your own payment gateway, you must pay to integrate ActiveEvents software with your merchant service account. (For details, see [Merchant Services Integration](#) on page 47.)

## ***Merchant Services Integration***

If you desire to use the ActiveEvents system to process payments through your own merchant account services you will be charged a nominal fee per transaction for the use of ActiveEvents Merchant Services Integration. The fee is designated in your Statement of Work and applies to all transactions processed for all attendee types. All accounting and reconciliation of transactions between the ActiveEvents system, the payment gateway, payment processor, and bank account are the responsibility of the client.

### **Included Services**

#### **Professional Services**

ActiveEvents provides default integration with the following payment gateways:

- Authorize.Net
- CyberSource
- JetPay
- Mtrex
- Secure Pay (used in Australia)
- PayPal Payflow Pro (previously VeriSign Payflow Pro)
- Verifi

### **Not Included**

For additional cost, this item may be possible as a custom service.

#### **Professional Services**

ActiveEvents does NOT:

- ◆ Provide default integration with a payment gateway that is not listed above. If you choose to use a different payment gateway, you will be charged a customization fee to integrate ActiveEvents Conference software with a different payment gateway. Integration is only available for gateways and not for payment processors or for variations of the above listed gateways. You are responsible for establishing your own gateway instance and its associated payment processor.

## ***Badges, Badge Holders, Lanyards & Ribbons***

ActiveEvents can order badge stock, badge holders, lanyards, and badge ribbons for your event.

### **Included Services**

[View Catalog](#)

#### **Professional Services**

ActiveEvents can do the following:

- ◆ Provide a **catalog** of badge stock, badge holder, lanyard, and ribbon designs for you to choose from.
- ◆ If you order early enough, can **copy a badge holder** that you provide or create a **custom badge holder** using your artwork and engineered drawings showing all specifications that you provide.
- ◆ **Consult** with you on which options will best meet your requirements.
- ◆ **Place your order** with our vendor.
- ◆ **Manage the timeline** to ensure you receive your materials on time.

### **Not Included**

#### **Professional Services**

ActiveEvents does NOT:

- ◆ Create your logo, graphics, or design for you. You must supply your own artwork.
- ◆ Guarantee delivery if you do not submit your requirements according to the deadline your ActiveEvents Project Manager provides you.

**Note:** Depending on your request, ActiveEvents must receive your requirements between 4 weeks to 14 weeks before your event. (To find out the dates your specific requirements are due, talk to your ActiveEvents Project Manager.)