SIEBEL *e*EVENTS MANAGEMENT GUIDE

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Introduction

This guide explains how to use the Siebel eEvents Management module to plan, execute, and evaluate marketing events. It includes information about setting up an eEvents Web site, and about the interactions Web users have with that site, in order to learn about and register for events.

This guide will be useful primarily to people whose title or job description matches one of the following:

Event Planners and Event Team Members	Persons responsible for planning and executing marketing events.
Marketing Administrators	Persons responsible for setting up and maintaining a marketing department. Duties include designing and managing campaigns, product marketing information, and product distribution lists.
Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality.
Siebel System Administrators	Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel applications.
Sales and Marketing Professionals	Persons covering the relationship with clients or prospects who may be interested in attending an event.

Persons responsible for installing and configuring Siebel eEvents Management need a thorough knowledge of the architecture of Siebel eBusiness Applications and standard Siebel installation and configuration procedures. A working understanding of Siebel Business Process Designer, Siebel Communications Server, and the Siebel Marketing, eSales, eService, and eChannel applications is strongly recommended.

How This Guide Is Organized

The chapters in this guide are in a sequential order necessary to plan, execute, and evaluate a successful event.

The largest chapter, Chapter 4, “Preparing for an Event,” is subdivided into sections on managing event tracks and activities, preparing necessary information, obtaining and preparing the physical site for an event, and completing other event preparation tasks.

If you are new to Siebel eEvents Management, read all the chapters that pertain to your responsibilities, in the order in which they appear in this guide.

Revision History

Siebel eEvents Management Guide, Version 7.5

Getting Started 1

This chapter lists the applications administration tasks that are specific to Siebel eEvents Management. Use this chapter in combination with *Applications Administration Guide*.

Applications Administration Guide covers the setup tasks that are common to all Siebel eBusiness Applications, such as using license keys, defining employees, and defining your company's structure. It also provides the information you will need to implement, configure, and monitor the Siebel sales, service, and marketing products and to perform data administration and document administration tasks.

This guide assumes that you have already installed or completed the upgrade of Siebel eEvents Management. If you have not, go to the Installation/Upgrade section of the *Siebel Bookshelf* CD-ROM and click the links to the guides that are relevant to your company's implementation.

The Siebel database server installation script creates a Siebel administrator account that can be used to perform the tasks described in this guide. For more information, see *Siebel Server Administration Guide* and the *Siebel Server Installation Guide* for the operating system you are using.

CAUTION: Do not perform system administration functions on your local database. Although there is nothing to prevent you from doing this, it can have serious results, such as data conflicts, an overly large local database, or a large number of additional transactions to route.

Administrative Setup Tasks

Table 1 lists and describes the administrative setup tasks that are specific to Siebel eEvents Management and tasks that might differ from those of the other Siebel eBusiness applications. Table 1 also directs you to documentation that provides information about each task.

When setting up your application, use Table 1 in combination with *Applications Administration Guide*.

Table 1. Administrative Setup Tasks

Administrative Task	Description	For More Information
Configuring the Shopping Cart	Set up Web access for Siebel eEvents for Finance	*Siebel eSales Administration Guide*
Configuring Email Notification	Configure automatic email notifications for events	*Siebel eMail Response Administration Guide*
Reviewing and Modifying Lists of Values (LOVs)	Customize values in picklists	*Applications Administration Guide* "Reviewing and Modifying Lists of Values (LOVs)" on page 27
Using Pricing Models	Create a pricing model, define price factors, unlock the model, and create a price list.	*Pricing Administration Guide*
Configuring the Events Calendar	Enable high-interactivity browser functionality and configure the calendar display	"Configuring the Events Calendar" on page 103
Using Reports	Setup report parameters	*Siebel Reports Administration Guide*

Installing and Configuring eEvents Management 2

Application administrators can use this chapter to understand concepts related to Siebel eEvents Management installation and configuration. The chapter contains an overview of server and client installation requirements, and Shopping Cart requirements. Configuring automatic email notification is also discussed.

Installation Overview

Server software for Siebel eEvents Management is automatically installed along with your other Siebel Server software. For more information, see the *Siebel Server Installation Guide* for the operating system you are using.

Client software is not required to use administrative or customer-facing functionality, provided that the client computer has a supported Web browser installed and is connected to a network that communicates with the necessary servers.

Shopping Cart Requirements

Siebel eEvents Management is designed to work with the Siebel eSales Shopping Cart, which allows users to pay for goods and services over the Web. In order for Siebel eEvents Management to work properly with the Shopping Cart, Siebel Business Process Designer must be present, and all Siebel eSales workflow policies must be activated. For more information about the Shopping Cart, see *Siebel eSales Administration Guide*.

NOTE: For Siebel eEvents implementations running DB2 Universal Database for AS/400, RSA encryption is required for eEvents Management to work properly with the Shopping Cart. For all other database servers, using RSA is strongly encouraged, but not mandatory. You will need to run separate scripts to enable RSA encryption.

For more information, see the *Upgrade Guide* for the operating system you are using. For information on running the scripts to change the encryption method to RSA, see *Siebel Tools Reference*.

Configuring Automatic Email Notification

Siebel eEvents Management is designed to send the following kinds of email messages:

- Invitations to events
- Confirmation messages when registrations for events are completed successfully
- Notification messages that events have no remaining seats open, but that the email recipients have been placed on waiting lists for any cancellations
- Notification of cancellations

In order for these messages to be sent automatically, Siebel eEvents Management must be configured to work with Siebel Business Process Designer and Siebel Communication Server. The general process for setting up automatic email notification for eEvents Management is described below. For more detailed information about creating communications profiles, restarting servers, and working with workflow policies and processes, see *Siebel Communications Server Administration Guide* and *Siebel Business Process Designer Administration Guide.*

Note that this process depends upon a correct email address being included in the Contact information for each person registered. For more detailed information about setting up automatic email notification, see *Siebel eMail Response Administration Guide*.

NOTE: This procedure assumes that you have already activated the Siebel eSales workflow processes needed for proper operation of the Shopping Cart.

To set up automatic email notification

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Policies and set an Activation Date and Expiration Date for each of the following policies:
   - eEvents Event Confirmation Email
   - eEvents Event Invitation Email

- eEvents Event Waitlisted Email

NOTE: For each Activation Date value, use a date that is earlier than the current date. Use an Expiration Date that is later than the current date.

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2 From Show drop-down list, choose Workflow Processes and activate the following processes:
   - Event Confirmation Email (eEvents)
   - Event Waitlisted Email (eEvents)
   - Event Invitation Email (eEvents)
   - Event Cancellation Email (eEvents)
   - Send Order Accepted Email (eSales)

3 Restart your Siebel Server and Gateway Server.

4 From the application-level menu, choose View > Site Map > Communications Administration > Communications Drivers and Profiles, and then set up a profile for a supported mail server (such as an Internet SMTP/POP3 server), including appropriate specifications for Profile Parameter Overrides.

   For an Internet SMTP/POP3 mail server such as Microsoft Exchange 5.5, iPlanet Solaris, SendMail, Hermes, or Lotus Notes, parameter overrides should include entries for the following parameters:
   - From Address
   - POP3 Account Name
   - POP3 Account Password
   - POP3 Server
   - SMTP Server

   For an Internet SMTP/POP3 mail server such as Microsoft Exchange 2000 or Groupwise, parameter overrides should include entries for the following parameters, as well as those listed above:

- POP3 Server Port
- SMTP Server Port

5. For each of the following templates, navigate to Communications Administration > All Templates, select the template, click the Advanced view tab, and use the Delivery Profile field to specify the profile you created in Step 4.
   - Event Confirmation Email Package (eEvents)
   - Event Waitlisted Email Package (eEvents)
   - Event Invitation Email Package (eEvents)
   - Order Accepted Email Package (eSales)
6. For each of the templates in Step 5, specify any needed changes to the text that will appear in your email notifications.
   - For the eEvents templates, make any needed text changes in the Template Text field on the Advanced form.
   - For the eSales template, click the Template Items view tab, and make the changes in the list that appears.
7. Make sure the Outbound Communication Manager component has been started.
8. Start the Generate Triggers server task.
9. Start the Workflow Monitor Agent server task for eEvents Group.

After email notification is properly configured, your Siebel application generates automatic email messages when event registration records have a registration status of Invited, Confirmed, or Waitlisted. Automatic email messages are *not* generated for session registration records. For more information about registration, including procedures for inviting and registering event attendees, see Chapter 5, “Registering for an Event.”

Defining an Event 3

Siebel eEvents Management helps you create and enter information that defines the scope, activities, and budget of an event. Defining an event is the first of four phases in the event management process. However, because requirements and task sequences can differ from event to event, the organization of eEvents Management screens may not exactly match the sequence or organization of tasks for your particular event.

You can use this manual and the eEvents Management software interface as a general guide to accomplishing your business tasks, but be aware that you may need to make some adjustments to the order in which you enter data and the ways in which you use eEvents Management software capabilities.

Event Management Process Phases

The event management process has four primary phases:

- Definition
- Preparation
- Implementation
- Evaluation

Siebel eEvents Management can help you define, prepare, implement, and evaluate events.

Depending on the size and complexity of your event, you may be tracking large amounts of information, including the status of many tasks. To simplify the process of learning to use eEvents Management, this manual discusses the four phases in the order listed above and provides instructions for business tasks that are typical of each phase. However, if your event is large and complex, you may find that the phases actually overlap, or you may find that changing circumstances occasionally require you to redo a previously completed task.

Event Definition

The definition phase typically includes the following business tasks:

- **Defining the purpose of the event.** Decide what do you want the event to accomplish.
- **Defining the type of event.** Decide if the event will be a seminar, a conference, a roadshow, or another type of event.
- **Defining the scope of the event.** Estimate approximately how many people will attend and for how long. Identify what types of people will attend.
- **Determining the nature and the logistics of the event.** Determine if the event will require specific timing, a specific location, or a venue.
- **Creating an action plan.** Identify what activities are required to conduct a successful event.

- **Creating a budget for the event.** Identify the budget categories and the anticipated costs associated are with each category.

Event Preparation

When you know the approximate nature and purpose of your event, your intended audience, and any constraints on timing and location, you are ready to begin preparing for the event. This phase typically includes the following business tasks:

- **Activity management tasks.** These tasks include:
  - Assigning event preparation and implementation tasks to employees, vendors, or other event staff
  - Tracking progress of event preparation activities
  - Designating the event staff and speakers
- **Information preparation tasks.** These tasks include:
  - Refining and organizing the information that will be presented at the event
  - Researching and choosing one or more speakers for the event
  - Tracking and managing speaker availability for the event
  - Preparing information for Web site publication
  - Preparing collateral to be distributed at the event
- **Site preparation tasks.** These tasks include:
  - Researching and choosing a venue for the event
  - Arranging for any needed facilities and equipment within the venue
  - Doing all needed physical setup of the event site prior to beginning the event.
- **Financial tasks.** These tasks include:
  - Forming partner relationships to improve event quality or defray expenses
  - Tracking expenditures and revenues in relation to the event budget
- **Other tasks.** These tasks include:

- Researching and choosing vendors for the event
- Inviting prospective event attendees
- Registering attendees in advance
- Preparing status reports concerning preparations for the event

Event Implementation

When you open the event to the first registrant, you have moved from the preparation phase into the implementation phase of the event. This phase typically includes the following business tasks:

- **Registering walk-in attendees at the event site.** Register walk-in attendees using administration screens, or let attendees self-register using the Web site (recommended).
- **Completing last-minute preparation tasks.** Complete last-minute tasks, such as recording the billing parameters the vendor will use, recording any discounts or special rates you negotiate, and storing file attachments for the subevent.
- **Coordinating with venue personnel.** Coordinate with venue personnel to address any facilities issues that arise during the event.
- **Coordinating with vendor personnel.** Coordinate with vendor personnel to make sure that they deliver contracted goods and services on time, in good condition, and at the correct locations within the venue.
- **Coordinating with partner organizations.** Coordinate with partner organizations to make sure that they meet their obligations for the event.

Event Evaluation

After the event has taken place, you will want to evaluate the event. This phase typically includes the following business tasks:

- **Preparing reports.** Create reports on attendance, opportunities generated, and so on for senior management.

- **Preparing reviews of the venues and vendors.** Review the venues and vendors used for the event to determine if they should be considered for future events and the reasons why or why not.
- **Following up on new business opportunities.** Follow up with the contacts that were generated during the event.

NOTE: You can analyze a contact's attendance frequency to target future events and determine areas of interest by navigating to the Contacts screen and choosing the Events view tab. For more information, see *Siebel Sales User Guide*.

Business Scenarios for Defining an Event

These scenarios provide examples of process flows performed by Siebel application administrators and event planners. Your company may follow different process flows according to its business requirements.

Administrator Event Definition Scenario

This scenario provides an example of a process flow performed by application administrators. In this scenario, an administrator works for a company holding a user week conference for a software product used by astronomers. In order for event planners and team members to efficiently manage the event, the administrator needs to setup Siebel eEvents Management for the particular informational needs of the event. Also, because Siebel ePricer has been purchased along with Siebel eEvents Management, the administrator needs to setup eEvents Management and ePricer to work together.

Using lists of values (LOVs), the administrator determines the available fields and selections that will allow the event planner and team members to enter and manage the specific information required of this event. For example, the event planner may need to add a planetarium, which is not typically an available selection, as a room type for an event on a college campus. To make this possible, the administrator reviews and modifies the list of values (LOV) that populates the static picklist for the event room type.

Finally, the administrator performs other procedures that speed data entry by event planners and team members. These procedures include adding and updating account data, entering contact data, and adding venues.

End-User Event Definition Scenario

This scenario provides an example of a process flow performed by end users. In this scenario, the end user is an event planner who, like the administrator described in "Administrator Event Definition Scenario," works for a company holding a user week conference for a software product used by astronomers.

The event planner uses Siebel eEvents Management to define the event by entering information about the event, such as its name, whether its a conference or seminar, timing, location, and so on. Typically, the event planner waits until the administrator has defined all of the fields and selections necessary before entering this information. In such cases, the event planner provides the administrator with enough information to define the event fields. However, due to the unusual topic of this event, the event planner decides to work in tandem with the administrator to define the fields and enter the event information.

Events often involve featured topics or themes, such as climate change, water pollution, and the ozone layer. In Siebel eEvents Management, these are called tracks. Therefore, as part of event definition, the event planner adds any such themes or topics as event tracks. If desired, in order to add additional continuity to the event, the event planner also associates related subevents.

Next, the event planner creates a budget for the event by entering estimated revenues and costs, such as advertising revenues and catering expenses.

Lastly, the event planner creates several activity templates, each of which can be used to associate a set activities, or action items, with the event.

Example Process Flow for Defining an Event

Figure 1 is based on recommended event definition tasks to be performed by administrators and end users in Siebel eEvents Management.

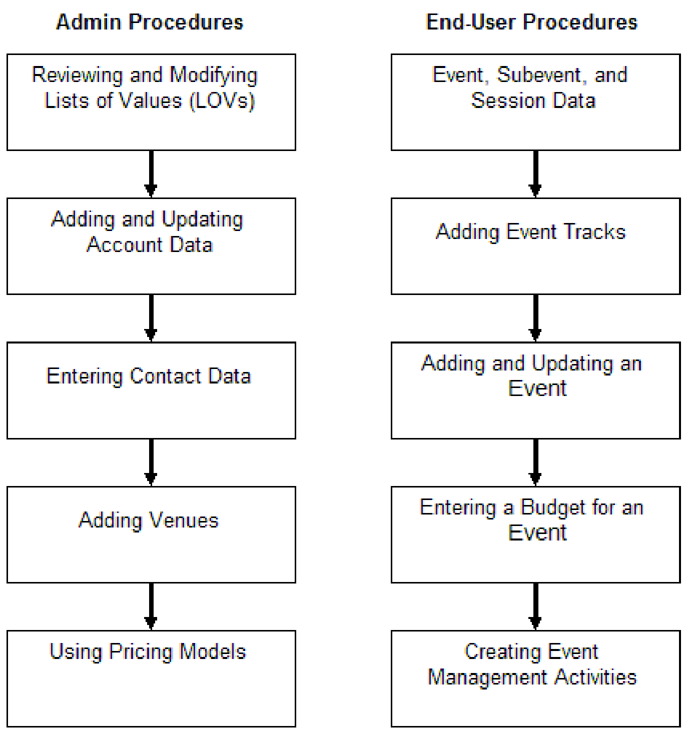

Figure 1. Process Flow for Event Definition Administrator and End-User Procedures

Administrator Setup Procedures for Defining an Event

This section discusses the following topics and procedures:

- Reviewing and Modifying Lists of Values (LOVs) on page 27
- Adding and Updating Account Data on page 29
- Entering Contact Data on page 30
- Adding Venues on page 31
- Using Pricing Models on page 32

Siebel eEvents Management contains fields that depend upon LOVs, existing Accounts, or Contacts data. As an administrator, you can use procedures described in this section to set up and prepopulate many LOVs before the first event is added to the database. By first defining and prepopulating LOVs, entering event information proceeds more efficiently. Also, you may want to verify that businesses and people with whom you will interact when planning and hosting events are added as Accounts and Contacts before you set up events. The sections that follow contain information about reviewing and modifying these items.

Reviewing and Modifying Lists of Values (LOVs)

Before you enter information about an event, you may want to review the existing LOVs to determine whether the values meet the needs of your company, and then add or modify LOVs to adapt them to your business processes.

To review and modify LOVs for event management

1. From the application-level menu, choose View > Site Map > Application Administration > Lists of Values.
2. Referring to Table 2 on page 28, review the LOVs for event management.
3. Update the values as required.

   For specific instructions on modifying LOVs, see *Applications Administration Guide*.

Siebel eEvents Management screens contain fields that display available values from LOVs such as those listed in Table 2.

Table 2. List of Values (LOVs)

List of Values	Comments
EVENT_BILLING_BASIS	Indicates whether a venue or vendor rate is calculated hourly, daily, weekly, monthly, or on a per-item or per-person basis.
EVENT_BUDGET_COST_TYPE	Displays a selection of standard types of event costs, such as venues, vendors, shipping, materials, collateral, and so on.
EVENT_COMMITMENT_TYPE	Displays a selection of contribution types a partner organization can make for an event, such as monetary, promotional, material, and so on.
EVENT_DRESS_CODE	Displays a selection of attire types appropriate for the event or session.
EVENT_FEE_TYPE	Indicates if a fee is required for the event. Values available by default include Registration, Voluntary, Donation, and None.
EVENT_FORMAT	Displays the format of the session featured, such as Keynote, Roundtable, Workshop, and so on.
EVENT_MATERIAL_STATUS	Indicates the status of event or session material items such as chairs, badges, flower arrangements, napkins, balloons, and so on.
EVENT_ORG_TYPE	Displays a selection of vendor or partner for an organization type.
EVENT_PARTNER_ROLE	Identifies the role of a partner organization in an event, such as Exhibitor, Sponsor, Contributor, and so on.
EVENT_PARTNER_STATUS	Indicates the status of arrangements with a partner organization, such as Requested, Shipped, Fulfilled, and so on.
EVENT_REG_STATUS	Displays the registration status of a potential attendee, speaker, or staff member for an event or an individual session.
EVENT_REVENUE_TYPE	Displays a selection of revenue sources related to an event, such as Partners, Sponsors, Advertisers, and so on.
EVENT_ROOM_TYPE	Displays a selection of room types available at event venues, such as conference rooms, classrooms, auditoriums, and so on.
EVENT_STAFF_ROLE	Displays a selection of staff member roles or areas of responsibility, such as Set-Up, Moderator, Clean-Up, and so on.

Table 2. List of Values (LOVs)

List of Values	Comments
EVENT_STATUS	Displays the registration status, such as Acknowledged, Approved, Scheduled, and so on.
EVENT_STATUS_CODE	Displays the status of an event or session, such as Planned, In Progress, Completed, and so on.
EVENT_TRAVEL_COVERAGE	Indicates if travel expenses are included in the event costs, and, if so, for whom.
EVENT_TYPE	Displays the type of parent event or subevent featured, such as Seminar, Deal Roadshow, Non-Deal Roadshow, and so on.
EVENT_VENDOR_ROLE	Displays a selection of vendor roles or areas of responsibility, such as Caterer, Audio/Video, Security, and so on.
EVENT_VENUE_ROLE	Displays a selection of venues, such as Convention Center, Hotel, Office, and so on.
OFFER_MATERIAL_TYPE	Displays a selection of collateral and literature types, such as Brochure, Map, Hand-out, and so on. This LOV is used in other areas of your Siebel application.
SALES_TOOLS_STATUS	Indicates whether a collateral or literature item has reached Draft, Final, Approved, and so on. This LOV is used in other areas of your Siebel application.

Adding and Updating Account Data

Many eEvents Management forms and lists contain fields that depend upon existing account data entered in the Accounts screen. An account represents the relationship between your company and the companies or individuals with whom you conduct business. Data entry in eEvents Management can proceed more smoothly if you have already entered account data for event vendors, partners, supporting organizations, and employing organizations of potential event invitees.

Before adding account data, identify the relationships for which you need to create accounts. Then use the following procedure to enter account data for each relationship.

To enter account data

1 From the application-level menu, choose View > Site Map > Accounts.

2 Before adding a new account, search the accounts list to make sure the account does not already exist.

3 If the account does not exist, click New, and then complete the fields for the new account.

4 In the Account More Info form, click the show more button and complete additional fields as needed.

As you gain additional information, or as account details evolve or change, you can update the account information. For more information, including details about adding an account, specifying account details including addresses, and handling company name changes, see *Siebel Sales User Guide* or *Siebel Call Center User Guide*.

Entering Contact Data

A few eEvents Management forms and lists contain fields that depend upon existing contact data entered in the Contacts screen. A contact is an individual with whom your company conducts business or expects to conduct business with in the future. A contact can be an employee of another company, a vendor, or professional consultant and may have relationships with a number of companies. Data entry in eEvents Management can proceed more smoothly if you have already entered contact data for:

- Your organization’s employees
- Potential staff (other than vendors)
- Potential venue personnel
- Potential individual invitees

To add a contact

1 From the application-level menu, choose View > Site Map > Contacts.

A contact record only appears on the My Contacts view if you are on the contact team for the contact.

2 From the Show drop-down list, select All Contacts.

3 In the Contacts list, click New, and complete the necessary fields.

For more information about entering Contacts, see *Siebel Sales User Guide* or *Siebel Call Center User Guide*.

Adding Venues

A *venue* is a physical facility where an event may be held, such as a conference center or hotel. In Siebel eEvents Management, you can store information about possible venues ahead of time, including their rental rates, and later choose which venue or venues to associate with an event. These and other end-user tasks are described further in Chapter 4, “Preparing for an Event.”

In preparation for working with venue data, you should add possible venues using the Location Administration screen as described in the following procedure.

To add a venue

1 From the application-level menu, choose View > Site Map > Location Administration.

2 In the Locations list, add a record, and complete the necessary fields.

The following procedure describes how to enter information about rooms that you may want to use for event venues, such as conference rooms, meeting rooms, classrooms, and so on.

To enter room information for a potential event venue

1 From the application-level menu, choose View > Site Map > Location Administration.

2 Select the location that you are considering as a possible event venue.

3 Click the Rooms view tab.

4 In the Rooms list, create a new record.

The following table describes some fields in the Room list.

Field	Comments
Drops	Information describing the network access ports.
Room	Name of the room you are considering as a possible event or session venue.
Rate	Cost of renting the room, per time unit or other unit identified in the Basis field.
Type	Type of the room.

The following procedure lets you record information about the equipment that is available in a potential room for an event.

To add the equipment available in a potential event venue room

1. From the application-level menu, choose View > Site Map > Location Administration.
2. Select the location that you are considering as a possible event venue.
3. Click the Rooms view tab to display the Rooms list.
4. Select the room for which you want to add equipment.
5. Scroll down to display the Equipment list below the Rooms list.
6. In the Equipment list, create a new record.

Using Pricing Models

If you have purchased Siebel ePricer along with Siebel eEvents Management and will be using the Siebel Shopping Cart view to charge customers event or session registration fees, you can use pricing models to adjust the registration fee a customer must pay to attend an event or session. The adjusted fee may be based on customer location, customer account agreements, or other factors.

The general process for setting up eEvents Management and ePricer to work together is described in this section. For more detailed information about using Siebel ePricer, see *Pricing Administration Guide*.

1 **Create a pricing model to use with eEvents Management.** Navigate to the Pricing Administration screen and use the Pricing Model Manager list to create a new pricing model. For more information, see the chapter on creating pricing models and pricing factors in *Pricing Administration Guide*.

2 **Use Pricing Factor Designer to define pricing factors.** These factors can include:

   - Discounts to certain accounts
   - Discounts on certain events or sessions

3 **Unlock the pricing model.** This makes the pricing model available to customers.

4 **Create a new price list and associate it with the pricing model.** Before you can test or release a pricing model, you must link it to a price list or customizable product. For more information, see the chapter on creating and assigning price lists in *Pricing Administration Guide*.

   NOTE: Do not specify line items for this price list.

5 **Associate the price list with the account.** Select the account for which you want the specified discounts to apply, and associate it with the price list.

6 **Verify account contacts.** Make sure account contacts are correctly listed in the Account Contacts view.

   When these account contacts log in to the eEvents Management Web site and register for the specified events or sessions, they receive the specified discounts automatically. The discount price appears as Net Price in the Shopping Cart view.

End-User Setup Procedures for Defining an Event

This section discusses the following topics and procedures:

- Event, Subevent, and Session Data on page 34
- Adding Event Tracks on page 35
- Adding and Updating an Event on page 36
- Entering a Budget for an Event on page 41
- Creating Event Management Activities on page 43

Event, Subevent, and Session Data

Siebel eEvents Management allows you to define events, subevents, and sessions. For the purposes of defining and organizing information for an event, you should note that Siebel eEvents Management uses a three-level hierarchy of events:

- **Event.** The master (or parent) event record in the database. When an event is created, subevents are automatically generated and initially inherit the fields from the parent event. The parent event spans the entire timeline for the overall event. Parent events are usually measured in weeks.
- **Subevents.** The propagated subevents, or children of the parent event, which comprise the individual days within the parent event timeline. A subevent is usually one day long.
- **Sessions.** The components of a subevent. Usually, many sessions make up a subevent. Sessions are typically measured in hours.

Event plans include defining the purpose, nature, and scope of the event, and making at least tentative decisions about when and where the event will be held. In Siebel eEvents Management, you can record these decisions in an event.

Later in the definition process, you can associate detailed information to this high-level event. Also, prospective event attendees will be able to view information from the listing on your Siebel eEvents Web site.

NOTE: In this release, information that is entered for a specific session is stored separately from information that is entered for the event that includes the session. For example, to view all information about event vendors, you would need to review the vendor information under the tabs for Events, Sub-Events, and Sessions.

Adding Event Tracks

A track in Siebel eEvents Management is a featured topic or theme at an event. For example, a biotech investment conference may establish three tracks: Genomics, Computers, and Pharma.

After tracks are added to an event, subevents and sessions can be related to any of the event's tracks. For example, using the biotech example, you could relate several sessions on using computers in biotech with the Computers track. As a result, contacts can view a list of sessions for the Computers track and choose which sessions to attend. In general, using the Tracks screen, event administrators and contacts can locate the event information they need more quickly and easily simply by selecting a track.

The following procedure describes how to add an event track. For information on relating a track to subevents and sessions, see Chapter 4, "Preparing for an Event."

To add an event track

1. From the application-level menu, choose View > Site Map > Events > Tracks.
2. Create a new event track record, and enter a status for the track. Some status values are Planned, Executing, In Progress, Completed, and Cancelled.

   NOTE: These status values are for descriptive purposes only and do not limit registration to associated sessions.

Adding and Updating an Event

This section describes how to create an event, which generates subevents. Creating an event also generates an activity in the Activities screen.

Note that the lists and forms for events and subevents use much of the same information. Many of the fields you enter for the event are inherited by its subevents. Each subevent inherits the values in the parent event fields when it is initially saved. After the initial save, the Status field and the External Access field inherit changes made to the parent event. (The External Access field is read-only at the subevent and session levels and can only be changed in the event record.)

NOTE: An event's Status field can be used to hide the event, and its subevents and sessions, from all users who are not using an Events Administrator Log In ID. This is accomplished by choosing the value *Hidden* in the Status field of an event. The Hidden status is then copied to that event's subevents and sessions. This also works in reverse—if a session's status is changed to Hidden, the change affects, or gets copied to, the status of the subevent or event.

You can modify a parent event at a later time, but there is not a dynamic link to change Sub-Events fields based on the changes made to the parent event to which they belong. You need to make manual changes to the subevents.

For instance, if the date range of a parent event changes, you need to add or delete outlying subevent records and related information manually. Further, if you add a new subevent that lies outside of the date range you initially set for the parent event, the parent event is not be updated to reflect the expanded date range.

The following procedure describes how to add an event.

NOTE: To avoid manually updating the subevents that the event generates, enter as much information as possible in the event record before you save it for the first time.

To add an event

1. From the application-level menu, choose View > Site Map > Events > All Events.

2 Create a new event record, and complete the necessary fields.

> **NOTE:** The start and end times for a subevent cannot be outside of its parent event's start and end times.

If you specify event team members, the Event Team field displays a list of team members. As the event creator, you will automatically be selected as the primary team member.

Table 3 describes some fields in the Event form.

Table 3. Selected Fields in the Event Form

Field	Comments
Call Leader	The name of the leader of the call for a conference call type of event. This name is usually required to participate in the call.
Cost Center	Your company's cost center in charge of financing the event.
Description	A free-form text field to describe the event. Information entered here is visible to prospective attendees as part of the Upcoming Events information on the Home Page.
Dial-In #	The telephone number that participants can use to access a conference call type of event.
Dress Code	Recommended event attire. Typical values include Business Casual, Business Formal Black Tie, Sport, and so on. The list of values that determines the available choices is EVENT_DRESS_CODE.
End	Required. Date and time that the event ends. The end value cannot be set to a date and time earlier than the Start value. Also, the end value cannot conflict with parent (subevents in the case of sessions, events in the case of subevents) start and end values.
Event Capacity	Approximate audience range projected for the event. This value is used, during registration, to help determine whether or not maximum enrollment for the event has been reached.
Event Name	Required. Name for the event that will be visible to internal and external users.

Table 3. Selected Fields in the Event Form

Field	Comments
Event Type	Required. Nature of the event. Typical values include Meeting, Conference, Trade Show, Seminar, and so on. The list of values that determines the available choices is EVENT_TYPE.
Fee Type	The fee is required for the event. Default values include Registration, Voluntary, Donation, and None.
Host Company	The partner company affiliated with the event.
Host Employee	The employee responsible for the event.
Invitation Deadline	Date by which invitations for the event should be sent to prospective attendees. Defaults to 60 days before the event Start.
Objectives	Text field in which to list the business goals of the event. Visible to administrators only.
Passcode	The passcode that participant's can use when dialing in to a conference call type of event.
Registration Fee	Fee for attending the event.
Related Events	Optional. Allows you to designate one or more events that are related to the current event. Visible to administrators only. For more information about specifying related events, see "To add an event" on page 36.
Replay #	The telephone number that allows participants to hear a replay of a conference call type of event if they missed the live event.
Replay Available Until	The date until which the conference call replay will be available.
Start	Required. Date and time that the event starts. The start value cannot be set to a date and time later than the end value. For a new event, both fields default to current date and time. The event automatically appears on the Events Calendar for each date from the start through and the end. Also, the start value cannot conflict with parent (subevents in the case of sessions, events in the case of subevents) start and end values.

Table 3. Selected Fields in the Event Form

Field	Comments
Status	Status of the event. Values available by default are as follows: ■ Planned. Visible only in administrative screens. Registration not allowed. ■ Executing. Visible in administrative screens and end-user screens. Registration allowed. ■ In Progress. Visible in administrative screens and end-user screens. Registration allowed. ■ Completed. Visible only in administrative screens. ■ Cancelled. Visible only in administrative screens.
Team	The employees responsible for accomplishing event-related tasks, including planning, hosting, and evaluating the event. By default, the user who creates the event is automatically listed as the primary team member. The primary team member or the system administrator can designate a different employee as the primary team member. For more information, see "To add an event" on page 36.
Travel Coverage	The categories of participants for which the hosting organization will cover travel expenses. Typical values include All, Attendees, None, Selected, Staff, and VIPs. The list of values that determines the available choices is EVENT_TRAVEL_COVERAGE.
URL	Location of a Web site providing more information about the event, such as http://www.siebel.com.
Venue	Main location where the event will be held, such as a hotel, conference center, or office building. Venues are associated with Companies.

After you create an event, you can associate one or more tracks with a subevent.

To associate tracks with a subevent

1. Click the Sub-Events view tab.
2. In the Sub-Events list, click on a subevent name.

3. Click the More Info view tab and, in the More Info form for the subevent, click the select button in the Related Tracks field.

4. In the Tracks dialog box, click New.

5. In the Add Tracks dialog box, select the track, click Add, and then click OK.

Making Changes to an Event

The following procedure describes how to make changes to an event.

To modify an event

1. From the application-level menu, choose View > Site Map > Events > All Events.

2. Modify the event record by changing the necessary fields.

   Changes made to the parent event will not automatically update in the subevents' fields. You can manually change subevent data from the Sub-Events screen.

To delete an event

1. From the application-level menu, choose View > Site Map > Events > All Events.

2. Select the event in the Events list and delete the record.

   CAUTION: If you delete an event, all subevents, sessions, and activities associated with it will also be deleted.

Associating Related Subevents

The following procedure describes how to associate related subevents.

To specify one or more related subevents

1. From the application-level menu, choose View > Site Map > Events, and select an event.

2. Click the Sub-Events tab, and select the subevent that you want to relate to other subevents.

3. In the Related Sub-Events field (the field is not displayed by default), click the select button, add one or more subevents, and then click Add.

4. Select the most important related subevent, and then click OK.

   The subevent you selected appears in the Related Sub-Events field.

Entering a Budget for an Event

As part of defining an event, you can create a budget for the event. The budget includes estimated revenues and costs. Then, as part of preparing for and hosting the event, you can enter actual revenues and costs. With this information, Siebel eEvents Management calculates budget variances (estimated versus actual amounts) so you can analyze an event's financial performance at each level of the event—event, subevent, and session. This capability allows your company to maintain a history of line item variances and budget accuracy over time.

NOTE: Costs and revenues for subevents and sessions are entered at the event level. When entering costs and revenues at the event level, fields are provided for associating the amounts with specific subevents and sessions.

The following procedure describes how to enter estimated costs for an event. The same procedure applies to entering estimated revenues, only you use the Revenue view on the Events screen.

To enter estimated costs for an event

1. From the application-level menu, choose View > Site Map > Events > All Events.

2. In the Events list, select the event for which you want to enter costs.

3. Click the Cost view tab.

4. In the Cost list, add a new record and complete the necessary fields.

   The Variance amount and running totals for Estimated Cost and Actual Cost are updated at the bottom of the Cost List when the record is saved.

5 (Optional.) To add invoice details to a cost record, create a new invoice record in the Invoices screen. Note the invoice number for reference in the remaining steps.

Some invoice record fields are described in the following table.

Field	Comments
Type	Select Payable. Invoices of type Receivable cannot be selected for cost line items.
Invoice #	This automatically generated number appears in the Invoice # field of the Invoice Items list when you return to the event's Cost view in Step 6.

6 Navigate back to the Invoice Items list in the Cost view for the event.

7 Click the select button in the Invoice # field to copy in the invoice information from the Invoices screen.

The following table describes some fields in the Invoice Items list.

Field	Comments
Quantity	The number of items associated with the cost line item.
Invoice Expected?	A Yes or No value, based on whether or not a vendor will generate an invoice.
Invoice Date	The date the Invoice # is entered (auto-populated).
Invoice Status	The status of the invoice. Typical values are Open, On Hold, Cancelled, Consolidated, and Closed.
Vendor Invoice #	The invoice number entered on the Invoices screen in the All Invoices list.
Vendor Name	The account name of the vendor.
Cost Code	An internal cost code associated with the line item.

Creating Event Management Activities

An activity in eEvents Management is an action item, such as creating collateral, that needs to be assigned and completed prior to the start of an event. These action items are entered using the Activities view tab in Siebel eEvents Management.

NOTE: Some view tabs have names that closely resemble typical event action items, but which are, in fact, reserved for the products of action items. For example, the Collateral view tab is where collateral, a product, is stored after an individual creates collateral, an action. Use the Activities view to list action items such as creating collateral and to assign them to specific individuals.

During this phase of event management, you enter activities for the event and its subevents. Then, during the next phase of event management, event preparation, you assign the activities to specific staff members, and track activity progress.

When entering activities, you can enter records individually for each event, or you can create a reusable activity template, which automatically associates a set of activities with any event you choose.

You can also combine individual activities with activities from an activity template. If some activities in an activity template do not apply to an individual event, they can be removed from the event without affecting the template.

The following procedure describes how to create a reusable activity template for an event.

To create an Activity Template for an event

1. From the application-level menu, select Application Administration > Activity Templates.
2. In the Activity Templates list, create a new activity template.
   a. In the Type field, select Event Management.
   b. Leave the Sales Stage and Sale Method fields blank, because they do not apply to Siebel eEvents Management activities.

3. In the Activity Templates Details tab, create a new activity template detail record for each activity associated with the activity template.

   For information on creating activity templates, see *Applications Administration Guide*.

To associate an Activity Template with a subevent

1. From the application-level menu, choose View > Site Map > Events > All Events.
2. In the Events list, select an event.
3. Click the Sub-Events tab and select the Sub-Event that you want to associate with the activity template.
4. Click the Activity Plans view tab. In the Activity Plans list, create a new record.
5. In the Template field, choose a predefined template from the drop-down list.
6. Complete other fields as needed.
7. In the Activities list, click any link in the Activity Type field to edit details of that activity.

   The display changes from the Events screen to the Activities screen, and an Activity form and an Attachments list are displayed.

The following procedure describes how to add an individual activity to a subevent.

To add an activity to a subevent

1. From the application-level menu, choose View > Site Map > Events > Sub-Events.
2. Click the Activities view tab, and, in the Activities list, click New.
3. Fill in the fields, as needed.

   A modified list of activities appears.

4 Preparing for an Event

This chapter discusses how to organize, schedule, and assign the many tasks required to produce a successful event. Specifically, the chapter provides procedures for organizing and staffing sessions, and associating each session with a track. In addition, you can add detailed activities and assign them to event staff. Other preparation tasks for physical aspects of the event site are described, and procedures are provided for involving external parties such as vendors and speakers.

Event Preparation Tasks

A large number of interdependent tasks must be carried out during preparation for an event. In this chapter, these tasks are grouped into the following categories:

- Track management tasks
- Activity management tasks
- Information preparation tasks
- Site preparation tasks
- Other tasks

The grouping and sequence of tasks presented in this chapter are arbitrary. The order in which end users and event managers choose venues, vendors, partners, and speakers may vary by company and by event. You may be able to confirm session information, locations, and schedules early in the event management process, or you may need to adjust session characteristics right up to and even during the event.

NOTE: Because the order of event preparation tasks varies, it is recommended that you read this entire chapter at the beginning of your event planning and preparation process. This allows you to approach event preparation with an appropriate sequence and schedule for an event.

Business Scenario for Preparing for an Event

This scenario provides an example of a process flow performed by an event planner. Your company may follow a different process flow according to its business requirements.

Continuing the example from "Business Scenarios for Defining an Event" on page 24, at this stage the event planner has defined several tracks for the event. Now, the event planner completes the following track management tasks:

- She identifies the sessions that make up each of these tracks and associates the sessions with their respective track.
- She creates a list of track members for each track by associating particular contacts with particular tracks.
- She associates related tracks with one another.

Next, the event planner completes the following activity management tasks:

- She adds staff to subevents and sessions.
- She assigns event staff members to various activities, then monitors the progress of those activities.

Concurrent with the activity management tasks, the event planner completes the following information preparation tasks:

- She adds sessions to subevents.
- To confirm there are no unintentional gaps or overlaps in the timing of sessions, she views session schedules.
- She adds speakers to sessions.
- She publishes event information to a Web site.
- She prepares event collateral and adds specific collateral to the appropriate subevents and sessions.

Next, the event planner completes the following site preparation tasks:

- She chooses a venue and enters room information.

- She adds information about the equipment available in an event venue room.
- She enters a location for a subevent venue. Because the location is a hotel where special rates are available for event attendees, she also associates the venue rate codes with the subevent.
- Having entered the venue and its rate codes, she can enter venue billing information.
- Having entered locations as event venues and having entered rooms associated with those locations, she assigns specific rooms to individual sessions within the event.
- She associates event materials, such as balloons and helium tanks, with the subevents for which they will be used.

These are just some of the many tasks that the event planner performs to prepare for an event. Other preparation tasks include associating partner organizations and vendors with subevents or sessions, recording billing parameters for event vendors, entering vendor discounts and other special rate codes, attaching files to subevents, and so on.

Example Process Flow for Preparing for an Event

Figure 2 is based on recommended end-user procedures for event preparation in Siebel eEvents Management.

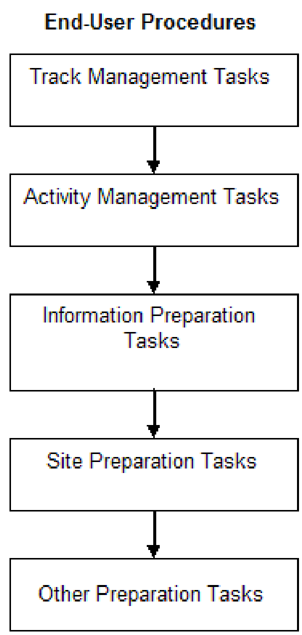

Figure 2. Process Flow for Event Preparation End-User Procedures

End-User Procedures for Preparing for an Event

This section discusses the following tasks:

- Track Management Tasks on page 50
- Activity and Staff Management Tasks on page 53
- Content and Speaker Preparation Tasks on page 56
- Site Preparation Tasks on page 65
- Other Preparation Tasks on page 71

Track Management Tasks

As described in Chapter 3, “Defining an Event,” a track in Siebel eEvents Management is a featured topic or theme at an event. For example, a biotech investment conference may establish three tracks: Genomics, Computers, and Pharma.

In Chapter 3, “Defining an Event,” you created tracks and associated them with subevents. In this chapter, you complete the following additional track-related tasks:

- **Associating one or more sessions with a track.** Identify a track that needs to have one or more sessions associated with it, and then select those sessions from a list.
- **Associating one or more tracks with a subevent or session.** Identify a subevent or session that needs to have one or more tracks associated with it, and then select those tracks from a list.
- **Associating related tracks.** Select a track, identify other tracks that are related to the selected track, and then associate those related tracks with the selected track.
- **Using the Tracks Calendar.** Select a subevent and view all of the subevent’s tracks, and all of the sessions that make up those tracks, side-by-side in a day planner format.

- **Associating contacts with a track.** Create a list of the members in a given track by selecting contacts and associating them with the track.
- **Viewing track members.** View a list of the contacts associated with a track.

Associating One or More Sessions with a Track

A track is typically comprised of one or more sessions. Therefore, after creating tracks and associating them with subevents, you need to add one or more sessions to each track of the event.

The following procedure describes how to associate one or more sessions with a track.

To associate one or more sessions with a track

1. From the application-level menu, choose View > Site Map > Events > Tracks.
2. In the Tracks list, select the track with which you want to associate one or more sessions.
3. Click the Related Sessions view tab. In the Related Sessions list, create a new record.

Associating One or More Tracks with a Subevent or Session

The information about a subevent or session can include a list of related tracks. The following procedure describes how to associate one or more tracks with a subevent or session.

To associate one or more tracks with a subevent or session

1. From the application-level menu, choose View > Site Map > Events > Sub-Events or Sessions.
2. Select the subevent or session with which you want to associate one or more tracks.
3. In the More Info form, click the select button in the Related Tracks field to select one or more tracks.

Associating Related Tracks

After creating tracks as described in Chapter 3, "Defining an Event," you may find it helpful to associate one or more related tracks to a given track.

The following procedure describes how to associate related tracks.

To associate related tracks

1. From the application-level menu, choose View > Site Map > Events > Tracks.
2. In the Tracks list, select the track with which you want to associate one or more related tracks.
3. In the More Info form, click the select button in the Related Tracks field.

After you have associated related tracks, the Related Tracks field in the More Info form shows the name of one of the related tracks. To view all of the related tracks, click the select button in the Related Tracks field.

Using the Track Calendar

Using the Track Calendar, you can view the scheduled sessions for several tracks side-by-side in a day planner format.

The following procedure describes how to use the Track Calendar.

To use the Track Calendar

1. From the application-level menu, choose View > Site Map > Events > All Events.
2. In the Events list, click a name hyperlink of an event.
3. In the Sub-Events list, click the name hyperlink of a subevent.
4. Click the Track Calendar view tab.

Alternatively, you can view track-related subevents, sessions, and members in the standard list and form views by choosing the corresponding view tabs on the Tracks screen.

Associating Contacts with a Track

The following procedure describes how to associate contacts with a track.

To associate contacts with a track

1. From the application-level menu, choose View > Site Map > Events > Tracks.
2. In the Tracks list, select the track with which you want to associate one or more contacts.
3. Click the Members view tab. In the Members list, create a new record.

Viewing Track Members

The following procedure describes how to view the contact that are associated with a track, or track members.

To view track members

1. From the application-level menu, choose View > Site Map > Events > Tracks.
2. In the Tracks list, select a track, and then click the Members view tab.

Activity and Staff Management Tasks

An activity in eEvents Management is an action item, such as *create collateral*, that needs to be assigned and completed prior to or during the event.

In Chapter 3, “Defining an Event,” you created activity templates (optional) and added activities to subevents. In this chapter, you can follow-up by adding staff and assigning them to specific activities. After activities are assigned, you can use your Siebel application to monitor the progress of activities.

Adding Staff to a Subevent or a Session

The Staff view in the Sub-Events and Sessions screens provides a quick way to add information about individuals with event responsibilities, including both employees and nonemployees, such as contractors and vendors.

NOTE: To add a new staff member for a session, the individual must first be added as a staff member for the subevent.

It is a good business practice to add staff members as contacts and their organizations as accounts before you define the event staff. See Chapter 3, "Defining an Event," for more information.

The following procedure describes how to add an existing employee or contact to a subevent.

To add a staff member to a subevent

1. From the application-level menu, choose View > Site Map > Events > All Events.
2. In the Events list, click the name hyperlink of an event.
3. In the Sub-Events list, click the name hyperlink of the subevent to which you want to add a staff member.
4. Click the Staff view tab. In the Staff list for the subevent, create a new record.

The following procedure describes how to add a staff member to an individual session. After a staff member is added, the session appears on the staff member's calendar.

To add a staff member to a session

1. From the application-level menu, choose View > Site Map > Events > All Events.
2. Select an event, and then click the Sessions view tab.
3. In the Sessions list, click the name hyperlink of the session to which you want to add a staff member.
4. Click the Staff view tab. In the Staff list, create a new record.

Working with Event Activities

Under most circumstances, event activities are assigned to *event team* members—employees from the event-hosting organization who have operational responsibilities for event planning, preparation, and implementation. However, some activities may be more appropriately assigned to people outside the event-hosting organization, such as vendor or venue representatives, or organizational employees who are not on the event team. Together, event team members and other people with event responsibilities are called *event staff*.

In order to assign an event to an event staff member using Siebel eEvents Management, the individual must be listed in the Siebel system Person table.

NOTE: An activity related to an event is assigned in the Sub-Events form, not in the Sessions form, even if it is for a particular session within the event.

To assign an event activity

1. From the application-level menu, choose View > Site Map > Events > All Events, and click the name hyperlink of an event.
2. In the Sub-Events list, click the name hyperlink of the subevent for which you want to assign an activity.
3. Click the Activities view tab.

   The Activities list appears.
4. Select the activity you want to assign by clicking the hyperlink in the Type field.
5. Do one of the following:
   - If you are assigning this activity to an employee of your organization, in the Employees field of the Activity form, click the select button and select an employee.
   - If you are assigning this activity to a contact outside your organization, in the Contacts field of the Activity form, click the select button and select a contact.

Monitoring Progress on Event Activities

You can use Siebel eEvents Management to update and monitor the progress of event activities. The view tab you use to enter and view activity information depends on whether a given activity is part of an Activity Plan or a stand-alone activity. The following procedure describes how to track activities.

To monitor progress of event activities

1. From the application-level menu, choose View > Site Map > Events > All Events, and click the name hyperlink of an event.
2. In the Sub-Events list, click the name hyperlink of the subevent for which you want to monitor activity progress.
3. Use one of the following methods to display activity details:

   - **For individual activities that may or may not belong to any Activity Plan,** click the Activities view tab.
   - **For activities that you want to view in the context of an Activity Plan,** click the Activity Plan view tab.

   In each case, the display changes to include an Activities list that displays status information.

4. Select an activity to update and complete the necessary fields.

Content and Speaker Preparation Tasks

Most business events involve the presentation of information. The amount and type of information presented varies across events, as do the means of presentation. This section describes the processes for organizing the information for presentation, choosing speakers for the event, and preparing collateral for distribution during the event.

This section provides material on how to prepare information for an event. Later sections of this chapter provide information about venues, equipment, budgets, vendors, and other aspects of event preparation and implementation.

Basic Questions

In the course of organizing the information for an event, you may find it useful to consider the following questions:

- What kind of audience do you hope to reach?
- What professional challenges do members of your audience face?
- How will the information help the audience meet its challenges?
- What is the size of the audience you intend to reach?
- What kind of presentation will your audience find most useful and appealing? For example, is your information appropriate for a lecture format, a hands-on workshop, a demonstration, and so on?
- How long will it take to present the information?
- What equipment, such as computers, projectors, projection screens, slides, sound systems, and telephone or network wiring, will you need for your presentation?
- What collateral item do you want audience members to take with them from the event?
- What resources (human and monetary) do you have for the event?

Having at least tentative answers to these questions helps you decide on the basic structure of an event, including session type and length, speakers, and collateral.

Organizing Presentation Content into Sessions

During event preparation, you need to establish sessions within subevents, allowing attendees to choose which presentations to attend. It is not mandatory to create sessions for a subevent with only one presentation, but creating sessions allows an attendee to synchronize to their personal calendar. Additionally, you can associate a speaker with one or more sessions, but not with subevents and events. You can also record feedback received on a session using the session's Feedback Form, as described in "Adding a Session to a Subevent."

When you organize a subevent into sessions, each session behaves like a subevent within a subevent, with its own requirements and staffing. Remember that certain information stored in Siebel eEvents Management at the session level is not visible at event or subevent levels.

Adding a Session to a Subevent

After you create an event, your Siebel application generates the subevents. You can add one or more sessions to a subevent.

To add a session to a subevent

1. From the application-level menu, choose View > Site Map > Events > Sub-Events.
2. In the Sub-Events list, click the name hyperlink of the subevent to which you want to add a session.
3. Click the Sessions view tab.
4. In the Sessions list, create a new record.

   The session record inherits the start date and end date from the subevent. The Status field displays the default value of In Planning.
5. Modify the Start and End fields as necessary.

   NOTE: A session's start and end times cannot be outside the range of its parent subevent's start and end times.

   ---
6. After entering a name, click the name hyperlink to navigate to the Sessions screen.
7. In the Session form, click the show more button and fill in the fields as needed.
8. To associate a venue with the session, click the select button in the Venue field.

9 To associate a room with the session, click the select button in the Room field.

NOTE: Repeat Step 4 through Step 9 for each additional session you want to add to the event.

The following table describes some of the fields in the session form.

Field	Comments
Session Fee	Any fee specific to the individual session, in addition to the event Registration Fee. This field may not be displayed in the Sessions list by default, but can be made visible by using the Columns Displayed command.
Comments	A text field for notes related to the session. Visible to administrators only. This field may not be displayed in the Sessions list by default, but can be made visible by using the Columns Displayed command.
Description	A description of the session. Information stored in this field is visible to potential event attendees who request detailed information about the session.
Dress Code	The recommended session attire. Values available by default include Business Casual, Business Professional, Black Tie, Sport, and Casual. This field may not be displayed in the Sessions list by default, but can be made visible by using the Columns Displayed command. LOV Type: EVENT_DRESS_CODE
End	Required. The date and time when the session ends. Defaults to the value of the End field for the event.
Fee Type	A description of the kind of fee noted for the session in the Additional Fee field, if any. Typical values include Donation, None, Registration, and Voluntary. This field may not be displayed in the Sessions list by default, but can be made visible by using the Columns Displayed command.
Feedback Form	An optional field for entering feedback received about the session.

Field	Comments
Format	The type of session. Values available by default include Keynote, Lecture, Panel, and so on. LOV Type: EVENT_FORMAT
Session Capacity	The maximum number of people who can attend the session. This field may not be displayed in the Sessions list by default, but can be made visible by using the Columns Displayed command. If a value is specified for Room, defaults to the capacity of the room. If no value is specified for Room, defaults to the Event Capacity value for the event. For more information about entering room characteristics, see "To enter room information for a potential event venue" on page 31.
Name	Required. A name to identify the session.
Related Sessions	One or more other sessions that cover related information. Available values are all sessions for all events. This field may not be displayed in the Sessions list by default, but can be made visible by using the Columns Displayed command.
Room	The specific room in the venue where the session is held. This field may not be displayed in the Sessions list by default, but can be made visible by using the Columns Displayed command. Available values depend upon information entered under the Rooms view tab of the Accounts screen. For more information about completing this field, see Step 9 on page 59. For more information about entering room information in the Accounts screen, see "To enter room information for a potential event venue" on page 31.
Start	Required. Date and time when the session starts.
Status	The status of the session. Values available by default include Planned, Executing, In Progress, Completed, and Cancelled. LOV Type: EVENT_STATUS_CODE
Venue	The location or facility where the session is held, which may or may not be related to primary venue for the event. For more information about specifying a venue, see Step 8 on page 58.

Viewing Session Schedules and Attendees

This section describes procedures for viewing session schedules and attendees. You can view session schedules using the Session Time Line. This method is helpful for confirming that there are no unintentional gaps or overlaps in the timing of sessions. You may also view a session's list of attendees to determine the session's popularity, or for informational purposes.

The following procedure describes how to view the Session Time Line.

To view the Session Time Line

1. From the application-level menu, choose View > Site Map > Events > Sub-Events.
2. Select the subevent for which you want to check session scheduling.
3. Click the Sessions Time Line view tab.

The following procedure describes how to view a list of session attendees.

To view session attendees

1. From the application-level menu, choose View > Site Map > Events > Sessions.
2. Select the session for which you want to view attendees.
3. Click the Attendees view tab.

Researching and Organizing Speakers

Siebel eEvents Management provides you with the ability to designate one or more speakers per session. Speakers must be members of the event staff, with "speaker" as their selected role. They can be employees of the event-hosting organization, or they can be persons from outside organizations. They may or may not be registered as event attendees, according to your preference. Speaker information is always stored in relation to a specific session, rather than to an event or subevent.

Adding Speakers to Sessions

The following procedure describes how to add one or more speakers to a session within a subevent.

To add speakers to a session

1. From the application-level menu, choose View > Site Map > Events > Sessions.
2. In the Sessions list, select a session for which you want to specify one or more speakers.
3. Click the Speakers view tab.
4. In the Speakers list, create a new record.

   The Status field indicates whether or not the speaker has been confirmed to speak at the event. It does *not* indicate the speaker's registration status as an event attendee.

Publishing Event Information to a Web Site

It is important to note that only subevents and sessions display on the customer-facing eEvents Web site (*the Web site*). Events and Tracks do *not* display on the Web site.

The combination of three Siebel eEvents Management settings affect whether or not information in the Sub-Events and Sessions screens is visible to prospective event attendees on the Web site. These settings are as follows:

- The status of the event
- The start date of the event
- The type of event

NOTE: There are check boxes on the Sub-Event and Session More Info form called "External," which are checked (set to true) by default. If you uncheck a subevent's External check box, the *subevent* and its sessions are not displayed on the Web site, regardless of the status, date, or type. If you uncheck a session's External check box, the session is not displayed on the Web site. Thus, External check boxes can be used to designate internal subevents and sessions that should not be published to the Web site, or subevents or sessions for which only an administrator can register attendees.

The following procedures describe how to choose settings for the visibility you want.

To make event information visible to all

1. From the application-level menu, choose View > Site Map > Events > All Events, and select an event.
2. Set the Status field to Executing or In Progress.
3. Set the Start field to a date in the future or to today's date.
4. Make sure Event Type is *not* set to Restricted.

To make event information visible to invitees and administrators

1. From the application-level menu, choose View > Site Map > Events > All Events, and select an event.
2. Set the Status field to Executing or In Progress.
3. Set the Start field to a date in the future or to today's date.
4. Set Event Type to Restricted.

NOTE: Events of type Restricted are not displayed in the customer site except to attendees who have been explicitly invited to the event. The attendee can view open invitations from the home page by clicking the View My Open Invitations link, and can then accept an invitation by registering for the event.

To make event information visible to administrators only

- Set Status to any value *except* Executing or In Progress, *or* set Start to a date earlier than today's date.
- If a subevent is visible, then the sessions related to it can be visible or not based on the value in the Status field in the session itself. As with events, a status of Executing or In Progress allows all users to see the session information.

Preparing Event Collateral

Another aspect of organizing information for an event is preparing literature such as brochures, white papers, presentation handouts, trade show exhibit maps, and so on. Collectively, such literature is known as *collateral*. Collateral can be a Web page URL or a file.

You can manage collateral preparation using activities in Siebel eEvents Management. After collateral is prepared, those electronic files, as well as vendor and venue contracts, can be stored in the Siebel eEvents Management.

Adding Collateral to a Subevent or a Session

You can use Siebel eEvents Management to store collateral for a subevent or for a specific session.

To add a collateral item to a subevent or a session

1. From the application-level menu, choose View > Site Map > Events > Sub-Events or Sessions.
2. Select the subevent or session with which you want to associate collateral.
3. Click the Collateral view tab.
4. In the Collateral list, create a new record.
5. Complete the necessary fields. Some fields are described in the following table.

Field	Comments
Extension	The file name extension for the file chosen in the File field. Typical values would include doc, ppt, xls, and so on. By default, this field may not be displayed in the Collateral list, but it can be added using the Columns Displayed command.
File	The operating system name of the file you are storing as collateral, without the file name extension. By default, this field may not be displayed in the Collateral list, but it can be added using the Columns Displayed command. For more information about completing this field, see Step 6 on page 65.
Name	A name to identify the collateral item.

Field	Comments
Status	The current stage of preparation for the collateral item. Typical values include Designed, Draft, Final, Printed, Shipped, and Submitted. LOV Type: EVENT_COLLATERAL_STATUS
Type	The kind of collateral item. Typical values include Brochure, Flyer, Handout, Layout, Map, and Presentation. LOV Type: EVENT_COLLATERAL_TYPE

6 To attach a file to the record, click the select button in the File field to display the Add Attachment dialog box, and then follow these instructions:

a Click Browse to display a Choose File dialog box.

b Use standard Windows techniques to select the file you want to designate as collateral, and then click Open.

The Choose File dialog box closes, and the selected file is listed in the File Name field of the Add Attachment dialog box.

c Click Add.

The Add Attachment dialog box closes, and the selected file is listed in the File field of the Collateral form in the main window.

Site Preparation Tasks

Event management requires site preparation. This section provides information about preparing the event site, including researching and choosing a venue, assigning rooms within a venue to individual sessions, arranging for needed materials, and setting up the site just before the event begins.

Researching and Choosing a Venue

A *venue* is a physical facility where an event may be held, such as a conference center or hotel. In Siebel eEvents Management, you can store information about possible venues ahead of time, including their rental rates, and later choose which venue or venues to associate with an event. A subevent can be associated with multiple venues. A session within a subevent can be associated with only one venue.

During or after an event, you can enter review comments about how well each selected venue functioned for your event. These comments can be useful for planning future events.

The following procedure lets you record information about the equipment that is available in a potential room for an event.

To enter a location for a subevent venue

1. From the application-level menu, choose View > Site Map > Events > Sub-Events.
2. In the Sub-Events list, select the subevent for which you want to enter a venue.
3. Click the Venues view tab.
4. In the Venues list, create a new record.

NOTE: You can also select a venue on the More Info form's Venue field on both Sub-Events and Sessions lists.

After you have entered a location as an event venue, you can specify venue rate codes for a subevent. If the venue is a hotel where event attendees stay, or if you do business with the venue regularly, you may have negotiated special rates for hotel rooms, conference rooms, and so on. Special rates may be associated with codes that attendees or event managers mention to the venue representative. The following procedure describes how to store information about venue rate codes.

To associate venue rate codes with a subevent

1. From the application-level menu, choose View > Site Map > Events > Sub-Events.

2. In the Sub-Events list, select the subevent for which you want to record venue rate codes.
3. Click the Venues view tab.
4. In the Venues list, select the venue for which you want to enter information.
5. Scroll down to the subview tabs, and click the Rate Codes subview tab.
6. In the Rate Codes list, create a new record.

   The following table describes some fields in the Rate Code list.

Field	Comments
Code	The code to mention to the venue representative in order to receive the special rate, such as `SEBL123`.
Comments	A text field to record other information, such as `Customer must mention rate code at time of check-in.`
Name	A name of your own choosing, to identify the rate code, such as `Marriott Siebel User Week Promotion`.
Type	A description of the special rate, such as `20% discount off lodging rates`.

At any time during the event management process, you can enter review comments regarding the venues you are working with. For example, you might want to note the name of a particularly helpful venue representative, or mention that a particular work crew might need closer supervision if the venue is reused for a future event. For more information about entering reviews, see "Entering Venue and Vendor Performance Reviews" on page 123.

Entering Venue Billing Information

After you have entered a location as an event venue and specified venue rate codes for a subevent, you can enter venue billing information. The following procedure describes how to enter venue billing information.

To enter venue billing information

1. From the application-level menu, choose View > Site Map > Events > Sub-Events.
2. In the Sub-Events list, select a subevent, and then click the Venues view tab.
3. In the Venues list, select the venue for which you want to enter billing information.

NOTE: A subevent must have venue before you can add a venue to its session. Rooms can only be selected after a venue for the session is selected.

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4. Click the Billing subview tab, and then create a new record.

   The following table describes some fields in the Billing list.

Field	Comments
Room	A required field that displays the rooms available within the venue. You can select a room from the dialog box.
Billing Basis	A value for the interval at which the room use is charged. The drop-down list displays typical values of Per Person, Per Item, Hourly, Daily, Weekly, and so forth.
Billing Rate	The negotiated rate from the account screen for the venue. You can edit the billing rate amount.
Quantity	A value for the number of rooms within the venue.
Flat Fee	The flat charge for the room. For instance, there may be a setup or booking charge that is not reflected in the Billing Basis or Billing Rate fields.
Total Cost	The actual room cost calculated by multiplying the billing rate times the quantity plus the flat fee. {(Rate*Quantity) + Flat Fee}
Comments	A text field for other information associated with the billing record.

Assigning Rooms to Sessions

After you have designated one or more locations as event venues and have entered rooms associated with those locations, you can assign specific rooms to individual sessions within the event. The following procedure describes how to assign a room to a session.

To assign a room to a session

1. From the application-level menu, choose View > Site Map > Events > Sessions.
2. Select the session to which you want to assign a room.
3. In the Session form, review the current value in the Venue field. If necessary, select another venue that is associated with the selected event.
4. In the Room field, select a room.

Arranging for Event Materials

Depending on the complexity of your event, you may need to arrange for a variety of materials to be available at the event site. In this guide, the term *materials* covers all items that you need at the site, with the exception of event collateral, which has its own category. Typical materials might include decorations, food and beverages, seating, give-away items such as CD-ROMs, and any electronic equipment that is not associated with a specific room at a venue.

Siebel eEvents Management allows you to associate the materials needed with a subevent and with individual sessions. Because session materials are considered to be subsets of subevent materials, you must first associate materials with a subevent before you can associate them with sessions.

The following procedure describes how to associate materials with a subevent.

To associate materials with a subevent

1. From the application-level menu, choose View > Site Map > Events > Sub-Events.
2. Select the subevent with which you want to associate materials.

3 Click the Materials view tab. In the Materials list, create a new record.

The following table describes some fields in the Materials list.

Field	Comments
Item	The name of the item needed for the event.
Source	The account serving as supplier of the item.
Unit Cost	The cost of each item.
Qty	The quantity of this type of item needed for the event.
Status	The status of the item. Typical values include Pending, Shipped, Delivered, On-Site, and Committed. LOV Type: EVENT_MATERIAL_STATUS
Total Cost	The Qty multiplied by the Unit Cost, which is automatically calculated when you save the record.

The following procedure describes how to associate materials with a session.

NOTE: Materials needed for individual sessions must first be associated with a subevent.

To associate materials with a session

1. From the application-level menu, choose View > Site Map > Events > Sessions.
2. Select the session with which you want to associate materials.
3. Click the Materials view tab.

4 In the Materials list, create a new record.

The Pick Materials dialog box appears, containing a list of materials specified for the subevent.

You can change the entries in the Qty or Comments fields to reflect session-specific information.

NOTE: Changes made to session materials quantities or comments are not reflected at the parent subevent level.

Setting Up at the Venue

When you have chosen a venue, assigned rooms to sessions, and arranged for materials, most of the remaining preparation activities take place on-site, within a few hours of the start of the event. On-site activities may vary across events, but the following list includes some typical setup activities:

- Setting up chairs
- Setting up and testing computers
- Setting up and testing audio-visual equipment
- Setting up collateral displays
- Setting up a check-in area for registered attendees
- Setting up a registration area for walk-in attendees

Siebel eEvents Management does not provide special screens, lists, or forms for on-site setup tasks. Use the Activities list to plan and track these actions, as described in "Activity and Staff Management Tasks" on page 53.

Other Preparation Tasks

This section describes how to use Siebel eEvents Management to collaborate with partner organizations, work with event vendors, attach files to a subevent, invite potential attendees, and generate event status reports.

Collaborating with Partner Organizations

When your organization prepares for an event, you may find it useful to collaborate with a *partner organization* that may benefit from sponsoring an aspect of the event. A partner may sponsor the event through financial support, or may provide services, equipment, speakers, and so on. A partner organization may be associated with a subevent or an individual session. Siebel eEvents Management provides lists and forms to help you keep track of partner commitments.

The following procedure describes how to associate a partner organization with a subevent. This procedure assumes that the partner organization has already been added through the Partners screen in your Siebel system.

To associate a partner organization with a subevent or session

1. From the application-level menu, choose View > Site Map > Events > Sub-Events or Sessions.
2. Select the subevent or session with which you want to associate a partner.
3. Click the Partners view tab. In the Partners list, create a new record.

   For sessions, by default, the Role, Value, and Partner Status fields display the values for the corresponding partner record for the subevent. You can change these values at the session level without affecting the partnership data at the subevent level.

   The following table describes some fields in the Partners list.

Field	Comments
Commitment Type	The kind of contribution the partner makes to the event. Typical values include Monetary, Promotions, Materials, Resources, Products, and Services. LOV Type: EVENT_COMMITMENT_TYPE
Name	The name of the partner organization. Available values consist of the organizations listed as Companies.

Field	Comments
Role	The role of the partner organization. Typical values include Exhibitor, Sponsor, Co-Host, Advertiser, Partner, Strategic Partner, Premier Partner, Base Partner, Gold Sponsor, Silver Sponsor, and Bronze Sponsor. LOV Type: EVENT_PARTNER_ROLE
Status	The status of arrangements with the partner organization. Typical values include Offered, Requested, Paid, Fulfilled, and Pending. Offered means that the partner organization has offered to be a partner. Requested means that the event-hosting organization has asked the partner organization for a partnership.
Value	The monetary value of the partner organization’s commitment.

Researching and Hiring Vendors

Previous sections describe event-related goods and services that are provided either by your own organization or by the venue or venues where the event is held. One additional category of providers remains to be discussed—vendors who are neither in your own organization nor affiliated with an event venue.

In Siebel eEvents Management, the procedures for working with vendors are quite similar to those for venues, except that the goods or services vendors provide are not as closely related to specific physical locations.

As with venues, a vendor can be associated with a subevent or a session. To associate a vendor with one or more sessions, you must first associate it with the subevent.

In preparation for working with vendor data, you should enter possible vendors as accounts. The Accounts screen allows you to enter vendors, vendor addresses, and vendor contacts before you set up an event. When entering vendors as accounts, choose Vendor in the Account Type field of the Vendor form. For more information, see Chapter 3, “Defining an Event.”

The following procedure describes how to associate a vendor with a subevent or session. Prior to associating a vendor with a session, you should have already associated the vendor with the subevent.

To associate a vendor with a subevent or session

1. From the application-level menu, choose View > Site Map > Events > Sub-Events or Sessions.
2. Select the subevent or session with which you want to associate a vendor.
3. Click the Vendors view tab. In the Vendors list, create a new record.

After you have associated a vendor with an event, you can record the billing parameters the vendor uses, any discounts or special rates you negotiate, and optional reviews of the vendor's performance for the event.

The following procedure describes how to record the billing parameters for an event vendor.

To record the billing parameters for an event vendor

1. From the application-level menu, choose View > Site Map > Events > Sub-Events.
2. Select the subevent for which you want to enter a vendor's billing parameters.
3. Click the Vendors view tab.

   The Vendors list and Billing subview appear.
4. Select the vendor for which you want to enter billing parameters.
5. In the Billing list, create a new record.

   The following table describes some fields in the Billing list.

Field	Comments
Flat Fee	The currency field for any flat fee to be charged instead of or in addition to the billing rate.
Qty	The actual quantity of basis units used by the event.
Rate	The currency field for vendor's rate per basis unit.
Service Type	The type of responsibility the vendor has for the event.

Field	Comments
Total Cost	A result of the automatic calculation based on Rate, Qty, and Flat Fee, when you save the record.
Units	The basis of the vendor's rate. Typical values include Per Person, Per Item, Hourly, Daily, Weekly, Monthly.

The following procedure describes how to enter any discounts or special rates you have negotiated with the vendor.

To enter vendor discounts or other special rate codes

1. From the application-level menu, choose View > Site Map > Events > Sub-Events.
2. Select the subevent for which you want to specify vendor rate code information.
3. Click the Vendors view tab to display the Vendors list.

   Billing, Rate Codes, and Reviews subviews appear below the Vendors list.
4. Select the vendor for which you want to specify rate code information.
5. Click the Rate Codes subview tab.
6. In the Rate Codes list, create a new record.

   The following table describes some fields in the Rate Codes list.

Field	Comments
Code	Any alphanumeric codes the vendor requires in order to honor the discount or special rate.
Name	A name to designate the discount or special rate.
Type	A description of the discount amount or special rate.

Adjacent to the Billing and Rate Codes subviews, there is a subview for review information about the selected vendor. For information about entering a vendor review, see "Entering Venue and Vendor Performance Reviews" on page 123.

Attaching Files

In the process of preparing for your event, you may want to store certain file attachments for a subevent, such as contracts with vendors, floor plans of exhibit halls, and so on.

NOTE: In this release, subevent attachments can be stored and retrieved only by users who have access to the administration screens in Siebel eEvents Management.

The following procedure describes how to attach a file to subevent information. This procedure is meant for subevent attachments only. Documents that are used for multiple events should be stored as collateral. For more information about storing collateral items, see "Preparing Event Collateral" on page 64.

To attach a file to a subevent

1. From the application-level menu, choose View > Site Map > Events > Sub-Events.
2. Select the subevent to which you want to add an attachment.
3. Click the Attachments view tab.
4. In the Attachments list, create a new record.

   For URL attachments, a hyperlink appears in the Attachment Name field to take you to the Web site. For file attachments, information about the selected file is now displayed in the Attachment Name, Size, Type, and Modified fields.

Inviting Prospective Attendees

This section provides an introduction to inviting prospective attendees. However, prior to inviting attendees, it is recommended that you read "Self-Registering to Attend an Event" on page 93.

You can invite prospective attendees to an event by registering an individual attendee or a list of attendees for the event and setting the Registration Status to Invited, which triggers an automatic email to the invitee(s). If the registration status is set to Invited when an invitee logs into your Siebel eEvents Web site, then the invitee sees the event listed when he clicks the View My Open Invitations link on the home page.

You can also register prospective attendees directly for subevents and sessions. For information about registration, including important descriptions of registration workflow rules, see "Self-Registering to Attend an Event" on page 93.

Entering and Tracking Travel Arrangements

As attendees, speakers, and staff are confirmed, travel arrangements for each can be entered using the Travel view tab. Also, multiple travelers, such as the speakers and staff for a multi-city event, can be added to a single travel arrangement.

Travel arrangements can be associated with all three levels of events—events, subevents, and sessions. For example, a staff member may involved in a one-day subevent, in another city, of a week-long event. In this case, you can enter the travel arrangements using the Sub-Events screen.

The following procedures involve travel arrangements for an event using the Events screen. You may find it helpful to reference the Events Calendar, listed in the Show drop-down list, when scheduling event travel arrangements.

To enter travel arrangements

1. From the application-level menu, choose View > Site Map > Events > All Events.
2. Select an event, and then click the Travel view tab.
3. In the Travel list, click New.
4. In the Travel Type field, select a travel type from the drop-down list.

   After you enter the travel type and move to another field, the Travel Detail form refreshes and show fields specific to the travel type you selected.
5. Fill in the remaining fields as needed.
6. Scroll down to the Travel Detail form, and fill in the fields as needed.
7. In the Attendees list next to the Travel Detail form, click New to add attendees to this travel arrangement.

   The Event Attendees dialog box appears.

8 Select the event attendees (press CTRL to select multiple attendees), and then click OK.

   The Company Name field is auto-populated. The Confirmation Number and Comments fields are optional.

You can track travel arrangements using the All Travel list in the Travel view. The All Travel list is a read-only list and is for informational viewing purposes only.

To track travel arrangements

1. From the application-level menu, choose View > Site Map > Events > All Events.
2. Select an event, and then click the Travel view tab.
3. In the Travel list, choose All Travel from the Show drop-down menu.

   A summary of all travel arrangements for the event, including travel arrangements associated with subevents and sessions, is displayed.

Preparing Event Status Reports

Throughout the event preparations, you may want to use the preconfigured event status report to summarize current information about registrations, budget, and revenue. The following procedure describes how to produce an event status report.

The event status report uses the Registration Status field to summarize response rate and interest levels among the invitees.

NOTE: Report parameters must be configured before you can select the Reports view. For information about setting report parameters, see *Siebel Reports Administration Guide*.

To prepare an event status report

1. From the application-level menu, choose View > Site Map > Events > Sub-Events.
2. Select the subevent for which you want a status report.

3 From the View menu, select Reports.

The Reports dialog box appears.

4 In the Select a Report field, select Event Status.

The event status report appears in a new window.

NOTE: Reports are currently not available at the Session level.

Registering for an Event 5

This chapter describes how to register for an event using Siebel eEvents Management. The chapter describes procedures both administrators and end users can perform that determine who is registered for events, subevents, and sessions. The chapter also describes the different approaches to registration, such as registering a contact list and registering an individual contact.

Example Process Flow for Registering for an Event

Figure 3 is based on recommended administrator and end-user procedures for registering for an event in Siebel eEvents Management.

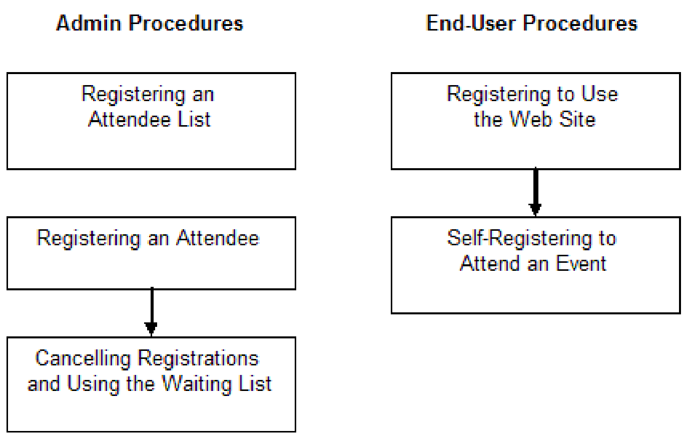


Figure 3. Process Flow for Event Registration Administrator and End-User Procedures

Registering an Attendee List

In Siebel eEvents Management, you can build lists of attendees and register all of the contacts on the list. This feature is available for events and subevents, but not for sessions. This is particularly useful when the same group of attendees needs to be registered for multiple subevents of an event.

The list of attendees that you register is built from within the Events or Sub-Events screen, as a part of the attendee registration process. The following procedure describes how to register attendees for an event by registering an attendee list.

To register an attendee list for an event

1. From the application-level menu, choose View > Site Map > Events > All Events.
2. In the Events list, select an event, and then click the Registration view tab.
3. In the Registration list, click the Add List button. The button is available when the event status is Executing or In Progress.
4. In the Add Attendee List dialog box, select a list or click New to create a new list.

After the list is registered, you can view the registered attendees using the Attendees view tab.

Registering an Attendee

There are two ways a potential attendee can be registered to attend an event:

- **Self-Registration.** The potential attendee can use a standard Web browser to visit the Siebel eEvents Web site and register for an event listed there.
- **Registration by an administrator.** A member of your own company can use administrative screens to register the potential attendee for an event.

Although self-registration through the eEvents Web site home page is recommended over registration by an administrator, there may be times when it is convenient for an employee of the presenting organization to register an attendee for an event or a session, rather than requiring the attendee to self-register. This is particularly useful for events that allow registration at the door—employees with access to administration screens can register walk-in attendees upon their arrival.

Self-registration is preferred because it uses LDAP security systems and authenticates a user's username and password. Registration from administrative screens may require site-specific steps to create matching user accounts for both your Siebel application and the security system.

NOTE: Not all event attendees must be customers or clients of your company. If you wish to track the attendance of event staff, speakers, personnel from partner organizations, and so on, you may do so by registering them as attendees.

The following procedure describes how you can register an attendee for a subevent or session directly from the administrative screens. Attendees who are registered for subevents and sessions are automatically registered for their parent subevents and events, as the case may be.

To register an attendee for a subevent or session

1. From the application-level menu, choose View > Site Map > Events > Sub-Events or Sessions.
2. In the Sub-Events or Sessions list, select the subevent or session for which you want to register an attendee.
3. Click the Registration view tab.

4 In the Registration list, click Add Attendee button to create a new attendee record.

NOTE: You must select an attendee in the Last Name field before you save the record. If you try to save the record without completing the Last Name field, the system will undo the record and all information is lost.

If the event does not have a registration fee, and if there is space available, the value of the Registration Status should be Confirmed.

If the registration status is automatically set to Waitlisted, then all seats are taken for the subevent or session. If you want, you can continue registering additional attendees, but they are placed on the waiting list.

If there is a fee for attending the subevent or session, and if there are seats available, the registration status is Pending until the fee payment is submitted in Step 5.

After an account or contact is registered, it disappears from the Registration tab. The record is transferred to the Attendees or Account Attendees tab, as appropriate. There is no data loss.

5 If this is a fee-based event, to step through the shopping cart and complete the purchase transaction with a credit card, click Finish. (The Finish button is available only if there is a fee.)

The following table describes some fields in the Registration list.

Field	Comments
Attendee Type	A general category representing the type of attendee. Typical values include Attendee, Premium, VIP, Guest, Staff-Internal, Staff-External, Staff-VIP, Speaker, and Speaker-VIP. LOV Type: PARTICIPANT_STATUS
Group	A text field for noting how this attendee is grouped with others. For example, one could group attendees by table number for a mealtime event with fixed seating.
Registered	The auto-generated date and time when the registration record is created. This field is not displayed by default in the Registration list, but can be added using the Columns Displayed menu command.
Registration #	A unique, read-only, alphanumeric code (auto-generated) for the current registration.
Registration Status	The status of the potential attendee's registration. By default, available values include Invited, Pending, Confirmed, and so on. When this setting has a value of Invited, the event appears in the invitee's My Invitations list on the Web site. LOV Type: EVENT_REG_STATUS

The following table describes typical Registration Status values.

Field	Comments
Attended	Indicates the potential attendee actually attended the event, subevent, or session. Enter this value only after attendance has occurred.
Cancelled	Indicates the potential attendee reversed their previous acceptance before the cancellation deadline.

Field	Comments
Confirmed	Indicates the participant completed the registration process.
Invited	Causes the event to appear in the invitee's My Invitations list on the Web site.
No-show	Indicates the potential attendee was confirmed for the event, but did not attend the event.
Pending	Indicates the potential attendee has been invited but has not responded.
Walk-In	Indicates the attendee was not confirmed prior to the event, but did attend the event.

Canceling Registrations and Using the Waiting List

In Siebel eEvents Management, registration can only be canceled from administrative screens. End users that want to cancel their event, subevent, or session registration must contact the organization holding the event and ask that an administrator cancel the registration.

When an event registration is canceled, all registrations for specific subevents and sessions associated with the event are canceled as well. Likewise, if a subevent registration is canceled, so are all registrations for specific sessions of the subevent. However, if a session registration is canceled, the event and subevent registrations are not canceled.

When the administrator cancels a registration for an event, subevent, or session that is full, a seat becomes available. However, in some cases, it may be desirable to prevent a seat from becoming available. To prevent a seat from becoming available, the administrator should reduce the capacity immediately prior to canceling the registration.

If the capacity is not reduced, and a seat becomes available, it is allocated to the next user whose registration is added by the administrator or whose registration status is changed from Waitlisted to Confirmed, whichever comes first. In other words, after a seat becomes available, it is recommended that administrators immediately change the registration status of the next waitlisted person to Confirmed. Otherwise, a new registrant may accidentally be given the seat designated for the waitlisted person.

The following procedure describes how to cancel an event registration from an administrative screen.

To cancel a potential attendee's registration for an event

1. From the application-level menu, choose View > Site Map > Events > All Events.
2. Select the event for which you want to cancel a registration.
3. In the More Info form, note whether the potential attendee is due any refund of fees, and, if so, the amount to be refunded.

4. If you want to prevent a seat from becoming available because of the cancellation, reduce the Event Capacity by one. For example, if the Event Capacity is 100, manually change the field to 99.
5. Click the Attendees view tab.
6. In the registration record to be canceled, change the Registration Status field to Cancelled.
7. Use your organization's standard procedure to provide any refund due to the person whose registration was canceled.

NOTE: It is possible to delete the registration record, rather than set the registration status to Cancelled, but this is not recommended. Deleting the record completely removes information about the registration that can be used to track the number of cancellations, to perform refunds, and so on.

After canceling a registration, the Event form shows that Openings increased by one and Seats Taken decreased by one.

You can give the new seat to the first person on the waiting list, as described in the following procedure. To do this, you first identify the person on the waiting list who has the oldest claim to an open seat. Next, you confirm their interest and availability for the event. Then, you change that person's registration status from Waitlisted to Confirmed. The following procedure is specific to an event, however, the concept can also be applied to a subevent or a session registration.

To allocate an open seat to a person on the waiting list

1. From the application-level menu, choose View > Site Map > Events > All Events.
2. Select the event for which a seat is becoming available.
3. Click the Attendees view tab.
4. On the Attendees tab, click the view menu button and choose Columns Displayed.
5. In the Columns Displayed list, make sure the Registered column is displayed.
6. In the Attendees list, click Query.

   a. In the Registration Status field, select Waitlisted.

   b. Run the query to display all currently waitlisted attendees.

7. In the Registered column header, click the up arrow to sort the listings by registration date and time.

   The person with the oldest listing on the waiting list is displayed in the first row of the list.

8. Confirm the potential attendee’s interest and availability for the event.

9. In that person’s record, change the Registration Status from Waitlisted to Confirmed.

End-User Procedures for Self-Registering for an Event

End users can self-register through the eEvents Web site. However, prior to a potential attendee self-registering for an event, the hosting organization should complete several tasks. These tasks are as follows:

- Establish the invitee's User ID
- Register the invitee to attend the event with a status of Invited
- Send an email to the invitee, which includes the address of the Web site and information about the username and password to be used at the site

After being invited, the potential attendee performs the following tasks:

- Visits the Web site and logs in using the specified username and password
- Views his current event invitations
- Self-registers to attend the event

NOTE: If the invitee registers to attend the event, that self-registration replaces the tentative registration record created by the administrator.

If the potential attendee wants to cancel his or her registration at any point in the process, they must contact an administrator who can cancel their registration for them.

Registering to Use the Web Site

In order to self-register using a Web browser, a potential attendee must first be a registered user of the Siebel eEvents Web site.

The first step in becoming a Siebel eEvents Web site user is to obtain the address for the site's home page. This address may be obtained through one of the following:

- A personal contact within the hosting organization
- A link on the company's corporate Web site
- An email message sent by the hosting organization

- An advertisement

After obtaining the home page address, and if the event is not restricted, any potential attendee can become a registered Web site user by clicking the New User link on the home page. Once registered on the Web site, the potential attendee can view event information and self-register for the event. However, if the event is restricted, the company hosting the event must establish the potential attendee as a registered Web site user and invite them to the event in order to enable the potential attendee to self-register.

NOTE: As described in Chapter 4, "Preparing for an Event," if the External check box is not selected in the Event form, the event is not visible to Web site users under any circumstances.

The following procedure describes how to self-register as an eEvents Web site user. You may want to adapt and distribute these instructions to your event-hosting employees and Web site users who have limited access to documented procedures.

To self-register as an eEvents Web site user

1. Use standard Web browser to navigate to the eEvents home page.
2. Click the New User link in the User Login form.

   A Personal Information form appears.
3. Complete the fields of the Personal Information form, noting the username and password values you enter (for future reference), then click Next.
4. In the Contact Information form, complete the fields, and then click Next.

   A Usage Terms dialog box appears, showing a license agreement.
5. Read the terms of the agreement, then click I Agree to proceed.

   A Registration Confirmation message appears.

6 Click Finish.

The Siebel eEvents Web site reappears, but the User Login form is no longer displayed, as you are now logged in.

NOTE: Siebel eEvents Management administration screens are accessed through Siebel applications such as Siebel Sales, Siebel Marketing, or Siebel Call Center. Depending on your Siebel application configuration, Siebel eEvents end-user screens may or may not be accessible through these Siebel applications, as well.

Self-Registering to Attend an Event

An end user can self-register to attend an event when all of the following are true:

- The end user is a registered eEvents Web site user.
- The event's Event Type is not set to Restricted.

When these conditions are met, an end user can view the event and register to attend the event. However, if the Event Type is Restricted, the end user cannot register to attend the event, and he or she can only view the event if they are an invited attendee.

The following procedures describe how a registered user of the eEvents Web site can register to attend an event and any particular sessions within a subevent that may require separate registration. Note, however, that attendees who are registered for subevents and sessions are automatically registered for their parent subevents and events, as the case may be.

NOTE: Confirmed registration for the subevent is required before registration for sessions is possible.

To self-register to attend an event

1 Navigate to the home page of the eEvents Web site.

2 Log in as a registered user of the site. New user registration is described in "To self-register as an eEvents Web site user" on page 92.

The Siebel eEvents home page reappears without the User Login form.

3 Click one of the following links to view event information:

- **Events link in Browse Events list:** Displays the Available Events list, which shows all events that are open to the general public.
- **Register for an Event:** Also displays the Available Events list, which shows all events that are open to the general public.
- **View My Open Invitations:** Displays the My Invitations list, which shows all events to which you have been invited, including restricted events.
- **Any event listed in the Upcoming Events area of the home page:** Displays an Event form and a Sessions list for the selected event.

4 If you clicked one of the first three links in Step 3, click the name of an event that interests you. Otherwise, proceed to Step 5.

5 In the Event form, click Register.

If there is no charge for the event, and if there is still space available, the My Events list appears. The list includes the event you selected, with the Status field set to Confirmed, showing that you are registered for the event. Also, an email message is automatically sent to you, reporting that your registration is confirmed for the event.

If there is no charge for the event, but the maximum enrollment has been reached, the My Events list appears, but the event listing shows a status of Waitlisted. An email message is automatically sent to you, reporting that you are on the waiting list and will be informed if space becomes available.

If there is a registration fee for the event, and if there is still space available, the Shopping Cart appears, containing information about the charge for the event.

a To continue registering for additional events before paying, return to the eEvents home page and repeat Step 3 and Step 4.

b To pay for all of the events you for which are registering, click Check Out.

c In the Payment Method form, enter your credit card and billing information. If you have used the Shopping Cart before, your previously entered information displays for you to edit or confirm.

d Click Continue to display the Order Summary, and verify that all information is correct.

e Click Confirm Order. An Order Confirmation message appears.

f Click Return to Home Page, and then click View Your Registrations to display the My Registered Events list.

The list includes the event(s) you selected, with the Status field set to Confirmed, indicating you are registered for the event. Also, two email messages are automatically sent to you, one reporting that your registration is confirmed, the other reporting your Shopping Cart transaction.

- **If there is a registration fee for the event, but maximum enrollment has been reached,** the My Events list appears, but the event listing shows a status of Waitlisted. An email message is automatically sent to you, reporting that you are on the waiting list and will be informed if space becomes available.

NOTE: If you do not complete the check-out process for the Shopping Cart, your registration status is set to Pending, by default. This status reserves a seat for you, if a seat is available, but only for a finite time period. The default length of time that a registration remains pending is 4 hours. After this period, pending registrations are automatically deleted.

The following procedure describes how to complete an unconfirmed registration for an event, either to convert a status of Pending to a status of Confirmed, or to convert a status of Waitlisted to a status of Confirmed.

To complete a pending or waitlisted registration to attend an event

1. In the My Events list on the Home Page, click the View Your Registrations link.

   The My Registered Events list appears.

2. Locate the listing for the registration that you want to complete, and click the link in the Name column of that listing.

   An Event form, a Sessions list, and a My Confirmed Sessions list appears.

3. Complete Step 5 on page 94.

The following procedure describes how to register for sessions within an event.

To register to attend sessions within an event

1 If you have not already done so, register for the sessions' event, and make sure that your registration status is Confirmed.

For instructions on how to register, see "To self-register to attend an event" on page 93.

2 In the My Events list, click the name of the subevent.

An Event form, a Sessions list, and a My Confirmed Sessions list appear.

3 In the Sessions list, find the session you want to register for, and then click the Register link.

A Session form appears. This form includes information about the time and place that the session will be held, and indicates whether or not there is an additional fee for attending the session.

4 Click the Register button.

If there is no additional fee for the session, and if there is still space available, the Event form, Sessions list, and My Confirmed Sessions list reappear. The selected session is listed in the My Confirmed Sessions list with a value of Confirmed in the Status field.

If there is no additional fee for the session, but maximum enrollment has been reached, the Event form, Sessions list, and My Confirmed Sessions list reappear. The selected session is listed in the My Confirmed Sessions list with a value of Waitlisted in the Status field.

If there is an additional fee for the session, and if there is still space available, the Shopping Cart appears, containing information about the charge for the session.

a To continue registering for additional sessions before paying, return to the eEvents home page and repeat Step 2 and Step 3.

b To pay for all of the sessions you for which are registering, click Check Out.

c In the Payment Method form, enter your credit card and billing information. If you have used the Shopping Cart before, your previously entered information displays for you to edit or confirm.

d Click Continue to display the Order Summary, and verify that all information is correct.

e Click Confirm Order. An Order Confirmation message appears.

f Click Return to Home Page, and then click View Your Registrations to display the My Registered Events list.

g Click the name of the event that includes the session you selected.

An Events form, Sessions list, and My Confirmed Sessions list reappear. The selected session is listed in the My Confirmed Sessions list with a value of Confirmed in the Status field.

If there is an additional fee for the session, but maximum enrollment has been reached, the Event form, Sessions list, and My Confirmed Sessions list reappear. The selected session is listed in the My Confirmed Sessions list with a value of Waitlisted in the Status field.To register for additional sessions, repeat Step 3 on page 96 and Step 4.

Troubleshooting Registration

If you are experiencing difficulty submitting credit card information using the Shopping Cart, make sure that eEvents is properly configured for the database software in use. For more information, see Chapter 2, “Installing and Configuring eEvents Management.”

Configuring and Managing the Events Calendar 6

This chapter discusses the requirements for displaying the events calendar. The chapter also describes how to configure the events calendar user interface for your company. For end users, procedures are provided for managing the events calendar and viewing sessions in the personal calendar.

Events Calendar Overview

Siebel eEvents Management allows individuals to manage an events calendar and synchronize sessions with their personal calendar, where the sessions appear as activities. This section provides an overview of the relationships between the events calendar and personal calendar, as well as providing information about events calendar browser requirements and icons.

Events Calendar and Personal Calendar Relationships

The following list provides information about the differences and relationships that exist between the events calendar and the personal calendar:

- The events calendar only displays subevents, and not sessions or events.
- The personal calendar only displays activities corresponding to subevents or sessions, and not events. When an employee registers for a session, an activity appears on the employee's personal calendar. For more information on the differences between events, subevents, and sessions, see Chapter 3, "Defining an Event."
- Personal calendar synchronization is a one-way communication from the sessions of an event to the personal calendar. Changes to the session item that display on the personal calendar are not saved to the session itself. If a user cannot attend a planned session listed on their personal calendar, the user must ask you, as the event's administrator, to remove their name from any speaker, staff, or attendee lists.
- Personal calendar items do not appear on the events calendar.

Events Calendar Browser Requirements

The person viewing the events calendar needs to use a high-interactivity browser. A high-interactivity browser supports real time updates to the user interface. For instance, when you drag a column divider to change column width, a high-interactivity browser displays your changes in real time. This functionality is particularly important in the events calendar and persistent filters, in which case using a low-interactivity browser results in an incomplete screen display.

NOTE: High-interactivity browsers include Microsoft Internet Explorer 5.0 or higher.

Events Calendar Icons

The events calendar displays icons that represent the status of a subevent. If a subevent is canceled, newly created, and so on, an icon appears next to it. You can configure which icon is associated with which event type by modifying the `GetAppropriateIcon` function in the script applet_event_hi_calendar_applet.js.

Table 4 describes typical icons that appear on the events calendar to represent a subevent status.

Table 4. Icons on the Events Calendar

Icon	Comment
	Canceled
	New
	Updated

Example Process Flow for Configuring and Managing the Events Calendar

Figure 4 is based on recommended administrator and end-user procedures for configuring and managing the events calendar in Siebel eEvents Management.

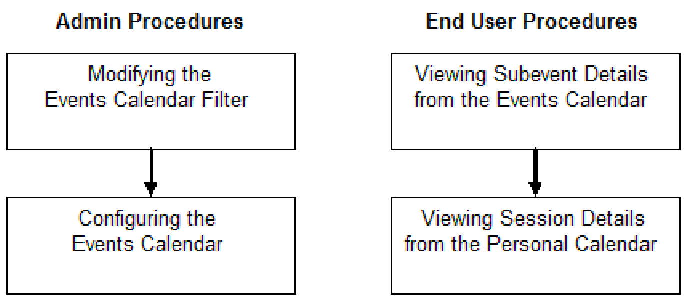


Figure 4. Process Flow for Events Calendar Configuration Management Procedures

Configuring the Events Calendar

There are two required tasks and one optional task for configuring the events calendar:

- **Enabling high-interactivity browser functionality.** Modify the Siebel configuration file to enable high-interactivity browser functionality in the events calendar.
- **Configuring the calendar display with Siebel Tools.** Use Siebel Tools to control the way the events calendar displays.
- **(Optional.) Configuring the calendar display with JavaScript.** Use the applet_event_hi_calendar_applet.js file to control the way the events calendar displays.

Enabling High-Interactivity Browser Functionality

The following procedure describes how to modify the Siebel configuration file to enable high-interactivity browser functionality.

To modify the Siebel configuration file to enable high interactivity

1. Navigate to the configuration file, and open the file.
2. Set HighInteractivity = TRUE. If HighInteractivity = FALSE, the browser cannot display the events calendar.

Configuring the Calendar Display with Siebel Tools

In order to display the events calendar, Event High Interactivity (HI) Calendar Applet settings must be modified using Siebel Tools.

As described in the following procedure, Event HI Calendar Applet settings are configured through the client side of the application.

To configure the calendar display with Siebel Tools

1. In Siebel Tools, locate Event HI Calendar Applet. The underlying business component for Event HI Calendar Applet is *eEvents Event*.

2 Customize behavior in the calendar's interface and display properties through the *Applet User Prop*, which defines the user properties that define the input settings for the calendar. The following table describes some values you can use for customization purposes. The table also lists internal user properties, which should not be modified during configuration. For more information, see *Siebel Tools Reference*.

Field	Comments
Field[1...x] = VALUE	Where VALUE is any field on the applet's business component to be returned in the property set on the client side in JavaScript.
HIC_DAY_VIEW = VALUE HIC_MONTH_VIEW = VALUE HIC_WEEK_VIEW = VALUE	Where if VALUE = "ENABLED", these tabs will appear for the calendar.
HIC_OVERFLOW_CELL = VALUE	Where if VALUE = "Enabled", the cells of the calendar expand to fit the data.
Sdate = VALUE	Where VALUE is the name of the field corresponding to the start date interval being used for searching in the applet's business component.
Ddate = VALUE	Where VALUE is the name of the field corresponding to the end date interval being used for searching in the applet's business component.
HIC_7DAY_SCHED_PARAMS.cols HIC_7DAY_SCHED_PARAMS.rows HIC_7DAY_SCHED_PARAMS.split HIC_7DAY_SCHED_PARAMS.times lots HIC_STARTTIME HIC_ENDTIME UserID UID SkipInitialQuery	These are internal user properties that configurators do *not* use.

Configuring the Calendar Display with JavaScript

In addition to using Siebel Tools to configure the calendar display, you can configure the calendar display directly by modifying JavaScript code in the script file `applet_event_hi_calendar_applet.js`. This is an optional approach to configuring the events calendar.

NOTE: Client settings can override the JavaScript in the applet_event_hi_calendar_applet.js file.

The main function in the script is:

```
Event_HI_Calendar_Applet_Applet_PreInvokeMethod (name,
inputPropset)
```

This function accesses the HTML that is used to format the events calendar display. Thus, by modifying this function, you can modify formatting of the events calendar. Moreover, this function's `name` parameter takes a value that determines whether the weekly and monthly calendar format is invoked or whether the daily calendar format is invoked, as described in Table 5. Depending on which lines of code are invoked, different HTML is accessed. As a result, you can modify the HTML to reformat the weekly and monthly calendar display without affecting the daily display, and vice versa.

Table 5. Parameter Values for Displaying the Events Calendar

Value	Comments
`RenderCalendar_Week_Month`	If this value is passed in, code for displaying the weekly and monthly calendar format is invoked. The code for displaying the weekly and monthly calendar can be modified.
`RenderCalendar_Daily_Today`	If this value is passed in, code for displaying the daily calendar format is invoked. The code for displaying the daily calendar can be modified.

Other useful JavaScript code for configuring the events calendar is described in Table 6.

Table 6. JavaScript Code for Configuring the Events Calendar

JavaScript Code	Comments
`oPropset`	This object contains a collection of event records. The fields in these records are defined in the user properties of Event HI Calendar Applet and can be accessed by an administrator. To access the Event Type value of an event record, do the following: **1** Define a user property in Event HI Calendar Applet as *Field1 - Event Type.* **2** Reference the Event Type property `oDoc.GetProperty(“4”)` in applet_event_hi_calendar_applet.js.
`while((oDoc=oPropset.EnumChildren(bt))!=null)`	This code loops through each item. `oDoc` contains a record from the *eEvents Event* business component. All of the records of `oPropset` are returned, enumerated, and bucketed into the correct date slot.
Event Type = `oDoc.GetProperty(“4”)` Event Name = `oDoc.GetProperty (“5”)` Status = `oDoc.GetProperty (“6”)` Created = `oDoc.GetProperty (“7”)` Updated = `oDoc.GetProperty (“8”)`	These business component fields are accessible from the client side of the application.

Table 6. JavaScript Code for Configuring the Events Calendar

JavaScript Code	Comments
`Sched_Params`	The global calendar JavaScript object that contains the HTML for each cell in the calendar. The HTML for each cell can be accessed via `SCHED_PARAMS.dateRangeData[y]` where `y` represents the cell date ordinal. In weekly mode, `y` is 0 through 6. In monthly mode, `y` is 0-number of days in the month. Note that a date comparison is done as follows: `(SCHED_PARAMS.dateRange[x].toDateString(“mm/dd/yyyy”))` This *toDateString* comparison must be kept in this format (mm/dd/yy) because it is internal to the core calendar class and how dates are stored. To determine in which cell to place a record, perform a date comparison with each record enumerated.
`GetBannerColor()`	This function highlights the different event types and places banner colors behind them. To change the colors, change the values assigned to each event type with this function.

End-User Procedures for Managing an Events Calendar

End users can see a list of upcoming subevents at any time by viewing the events calendar. The first part of this section describes how you can use the events calendar to learn about new subevents and sessions for which you may want to register.

After you register for a session within a subevent, your Siebel application also displays the session on your personal calendar. The second part of this section describes how you can view session details from your personal calendar and set an alarm to receive online session reminders.

Viewing Subevent Details from the Events Calendar

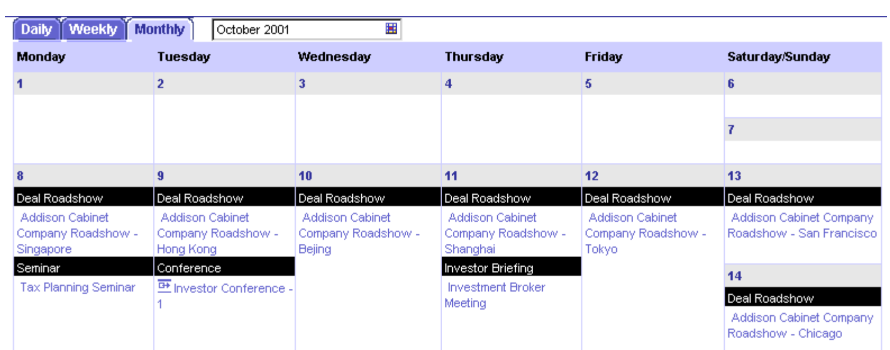
You can use the events calendar to view all subevents that are scheduled for the day, week, or month in a calendar format. Each subevent listing displays a hyperlink that takes you to details about the subevent and associated sessions.

The following procedure describes how to view subevent details and associated sessions from the events calendar.

To view subevent details from the events calendar

1 From the application-level menu, choose View > Site Map > Events > Calendar.

2 Click the Daily, Weekly, or Monthly view tab.



3 Click the name hyperlink for the subevent you want to view.

The Sub-Events form and Sessions list appear, showing details about the event.

4 Click the Session Calendar view tab.

The Event Session Calendar appears, showing an hourly breakdown for each session associated with the subevent.

Viewing Session Details from the Personal Calendar

The following procedure describes how to view session details on your personal calendar.

To view session details from the personal calendar

1 From the application-level menu, choose View > Site Map > Calendar.

2 Click the Daily, Weekly, or Monthly view tab.

Your planned sessions appear in your personal calendar.

3 In the events calendar, click the name hyperlink for the session you want to view.

The Calendar Detail form appears, showing activity-style details about the session.

NOTE: The personal calendar displays an activity for each session. A session activity in the calendar is a copy of the session information. You may not reschedule or modify sessions from the personal calendar.

---

4 In the Calendar Detail form, click the Alarm check box to receive an online reminder for the session.

Hosting an Event 7

This chapter discusses topics and procedures that help end users manage events on-site at the venue, using a direct connection to Siebel eEvents Management. The topics and procedures discussed include:

- System requirements for hosting an event
- Managing activities on-site at the event
- Hosting on-site registration
- Viewing venue, vendor, and partner information

System Requirements for Hosting an Event

In order to use Siebel eEvents Management at an event site, you need a dedicated connection to your Siebel database. If an event takes place at a venue that allows you to connect directly to Siebel eEvents Management on-site, you can establish an event operations center where you can review and update event activities, add or change registrations, and quickly locate information about event vendors and partners.

Example Process Flow for Hosting an Event

Figure 5 is based on recommended end-user procedures for hosting an event in Siebel eEvents Management.

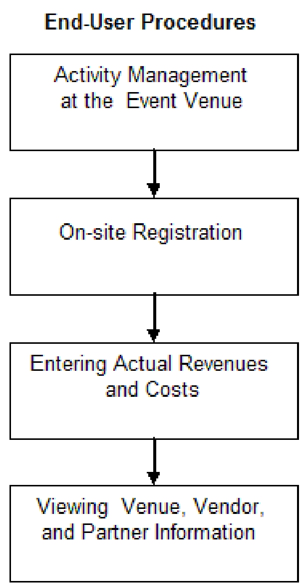


Figure 5. Process Flow for Event Hosting End-User Procedures

End-User Procedures for Hosting an Event

This section discusses the following topics and procedures:

Activity Management at the Event Venue

When you plan the activities that must be completed for your event, as described in Chapter 4, "Preparing for an Event," some of the activities may take place before, during, or after the event. To make sure that the event goes smoothly, review the status of event activities frequently during the preparation process.

If your event takes place at a venue that allows you to use Siebel eEvents Management on-site, you may want to review, update, add, and assign activities during the event.

On-Site Registration

If an event allows attendees to register on-site at the event, you may want to set up a registration area where event staff can use Siebel eEvents Management to register last-minute attendees.

For more information about how to perform this kind of registration, see Chapter 5, "Registering for an Event."

Entering Actual Revenues and Costs

An important aspect of event management is determining whether an event produces a good return on investment. In order to determine this, you must record actual event income and costs. In Siebel eEvents Management, you can record these amounts using the Revenue and Cost view tabs. These view tabs are also useful for analyzing budget variances, if you have established a budget for your event. For information on setting up a budget for an event, see "Entering a Budget for an Event" on page 41.

Actual revenues and costs can be entered using the Revenue and Cost view tabs at the event level only. However, using the Revenue and Cost views at the event level, you can associate the revenue or cost with a subevent or session. Then, you can view lists of revenues and costs by subevent or session. This information, which is read-only, is accessed from the Revenue and Cost views in the Sub-Events and Sessions screens. Changes to revenue and cost amounts or related-information must be entered at the event level using the Events screen.

It is also important to note that, in Siebel eEvents Management, registration income is not automatically posted as revenue. Similarly, expenditures associated with venues and vendors at the subevent and session levels are not automatically posted in the Cost view. An event manager or administrator must enter the information manually using the Revenue or Cost view tab in the Events screen. It is strongly recommended that multiple amounts falling under a single category, such as registration receipts, be aggregated and entered as a single revenue line item.

The following procedure describes how to record actual revenues for an event, subevent, or session.

To record actual revenues for an event, subevent, or session

1. From the application-level menu, choose View > Site Map > Events > All Events.
2. In the Events list, select the event for which you want to record revenue, and click the Revenue view tab.
3. In the Revenue list, click the New button to create a new revenue record.
4. To associate the revenue with a subevent or session, click the select button in the subevent or session field.

The following procedure describes how to record actual costs. If you have received an invoice, you enter the invoice information using the Billing Screen, and then you enter the cost item using the Events screen. If you have not received an invoice, skip Step 1 through Step 4 and begin with Step 5.

To record a cost

1. From the application-level menu, select View > Site Map > Invoices > All Invoices.

2. To enter a new invoice, click the New button. Note the Invoice # for reference in Step 9.
3. In the Type field, select Payable.
4. To select an account for billing identification purposes, click the select button in the Bill To Account field, and complete the necessary fields.
5. From the application-level menu, choose View > Site Map > Events > All Events.
6. In the Events list, select the event for which you want to record a cost, and click the Cost view tab.
7. In the Cost list, click the New button and create new cost record. A line for invoice details is automatically created in the Invoice Items list, which appears below the Cost list.
8. To associate the cost with a subevent or session, click the select button in the subevent or session field.
9. In the Invoice Items list, click the select button in the Invoice # field, and select the record with the Invoice # created in Step 2.

Viewing Venue, Vendor, and Partner Information

During an event, you may need to contact venue, vendor, and partner personnel, either to make sure that planned activities are carried out, or to address unforeseen needs that arise during the event. If you can access Siebel eEvents Management on-site, you can look up contact information for venue, vendor, and partner personnel.

The following procedures briefly describe how to look up this type of information. For information about entering new venue, vendor, and partner information, see Chapter 4, “Preparing for an Event.”

To view venue information

1. From the application-level menu, choose View > Site Map > Events > Sub-Events.
2. In the Sub-Events list, select the subevent for which you need information.
3. Click the Venues view tab.

4. Select the venue for which you need information.
5. Review the following areas for the information you need:
   - The venues record
   - The Billing subview tab
   - The Rate Codes subview tab
   - The Reviews subview tab
6. To view additional information about the venue, including location and account information, click the name hyperlink for the selected record in the Venues list.
7. To display venue room information, click the Rooms view tab.

To view vendor information

1. From the application-level menu, choose View > Site Map > Events > Sub-Events.
2. In the Sub-Events list, select the subevent for which you need information.
3. Click the Vendors view tab.
4. Select the vendor for which you need information.
5. Review the following areas for the information you need:
   - The Vendors list
   - The Billing subview tab
   - The Rate Codes subview tab
   - The Reviews subview tab
6. To view account or contact information, click the selected record's name hyperlink in the Name or Primary Contact column of the Vendors list.

To view partner information

1. From the application-level menu, choose View > Site Map > Events > Sub-Events.

2. In the Sub-Events list, select the subevent for which you need information.
3. Click the Partners view tab, and select the partner for which you need information.
4. To view account or contact information about the selected partner, click the name hyperlink in either the Name or Primary Contact column of the Partners list.

8 Evaluating an Event

When an event is over, your company can evaluate the effectiveness of the event using Siebel eEvents Management. This chapter discusses the following features that help end users evaluate events:

- Event summary reports
- Performance reviews of vendors and venues
- Attendee registration records

Example Process Flow for Evaluating an Event

Figure 6 is based on recommended end-user procedures for evaluating an event in Siebel eEvents Management.

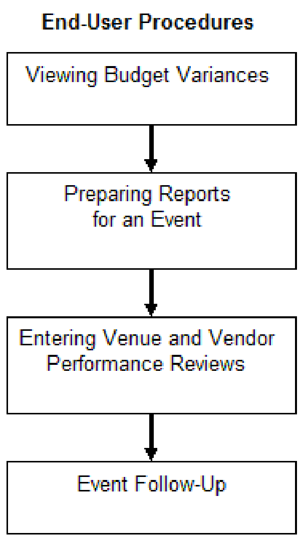


Figure 6. Process Flow for Event Evaluation End-User Procedures

Administrator Procedures for Evaluating an Event

There are no specific administrator procedures related to evaluating an event. However, as an administrator, you will need to set up reporting parameters during the initial configuration of your Siebel application.

For information on setting report parameters, see *Siebel Reports Administration Guide*.

End-User Procedures for Evaluating an Event

This section discusses the following topics and procedures:

- Viewing Budget Variances on page 122
- Preparing Reports for an Event on page 122
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Viewing Budget Variances

After recording actual revenues and costs, as described in Chapter 7, "Hosting an Event," you can view budget variances at the event, subevent, or session level. The following procedure describes how to view budget variances for an event.

To view budget variances for an event

1. From the application-level menu, choose View > Site Map > Events > All Events.
2. Select the event for which you want to view budget variances.
3. Click the Revenue view tab to view revenue variances, or click the Cost view tab to view cost variances.

Preparing Reports for an Event

Siebel eEvents Management includes a preconfigured event summary report to assist you in evaluating events. This report contains information on attendance, budget, revenues, and vendor and venue performance ratings.

NOTE: Report parameters must be configured before you can select Reports from the View menu. For information about setting report parameters, see *Siebel Reports Administration Guide*.

To produce an event summary report

1. From the application-level menu, choose View > Site Map > Events > Sub-E Events.
2. Select the subevent for which you want to produce a summary report.
3. From the application-level menu, choose View > Reports. If the Reports option is grayed-out, no reports are available. Otherwise, the Reports dialog box appears.
4. From the Select a Report field, select Event Summary.

   The Event Summary report appears in a new window.

Entering Venue and Vendor Performance Reviews

During or after an event, you can enter performance reviews of the venues and vendors with which you are working. To make sure the information is available when venues and vendors are considered for future events, enter comments soon after an event is complete.

The following procedure describes how to enter a venue performance review for an event.

To enter a venue performance review

1. From the application-level menu, choose View > Site Map > Events > Sub-E Events.
2. In the Sub-Events list, select the subevent for which you want to enter a venue performance review, and click the Venues view tab.
3. In the Venues list, select the venue that you want to review, and click the Reviews subview tab.
4. In the Reviews list, click New to create a new review record and complete the necessary fields. See Table 7 on page 124 for more information.

The following procedure describes how to enter a vendor performance review for an event.

To enter a vendor performance review

1. From the application-level menu, choose View > Site Map > Events > Sub-E Events.
2. In the Sub-Events list, select the subevent for which you want to enter a vendor performance review, and click the Vendors view tab.
3. In the Vendors list, select the venue that you want to review, and click the Reviews subview tab.
4. In the Reviews list, click New to create a new review record and complete the necessary fields. See Table 7 on page 124 for more information.

Table 7 displays some fields in the Reviews list.

Table 7. Selected Fields in the Reviews List

Field	Comments
Reviewer	Automatically populates with the username of the user who creates the review.
Posted	automatically populates with the date and time when the record is created.
Rating (1-10)	Lets you specify a numerical rating for the venue. Allowable values are 1 through 10, where 10 is the best rating.
Comments	Provides space for any comments you have about the venue or vendor.

Event Follow-Up

Siebel eEvents Management provides information that can be used to follow-up with invitees and attendees based on their levels and areas of interest. For an event with a single subevent, you can identify those with a strong interest by comparing the lists of those who were invited with those who attended. For a larger, multi-subevent event, you can identify areas of interest by reviewing which subevents and sessions particular contacts attended. For more information, see Chapter 5, “Registering for an Event.”

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