Technical Product Descriptions
for ActiveWorks Conference™ Event Management Technology

The Conference event management suite, part of the ActiveWorks Events platform from the Active Network, is sold in separate modules. This document explains the features and services that are included in each module.

Each software module that you purchase generally includes:

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

Administration and Management Tools. The Administration Tool lets your staff and Active Network staff set up the end-user applications, and then view, update and report on your event data.

Professional Services. Staff at Active Network, Events (also referred to as "Active" in this document) become part of your event management team and provide these services for each module:

- A **Project Manager** helps you plan and track your software implementation timeline.
- A **Business Analyst** trains you on how to use the management tools and helps you set up the software using information you provide on Implementation Forms.
- **Note:** This document outlines the services your Business Analyst *may* provide for each module. Actual services provided may differ depending on the hours allocated in your Scope of Work.

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

Registration

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

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

Exhibits

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

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

Content

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

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

Social Networking

- **ActiveEvents Connect™** Lets attendees learn about and contact other attendees, speakers, or exhibitors before, during, and after your event.
- **ActiveEvents Mobile** Lets attendees use mobile devices to access and interact with event content.

Surveys

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

On-site

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

- Check-in and Badging
- iPad® Onsite Tools
- Instant Schedule Printing
- Cyber Café Kiosk
- Gift and Materials Distribution
- ActiveEvents Leads™
- Session Access Control™
- Meetings Access Control (MAC)
- Digital Signage
- On-Site Server Cluster

Note: On-site tools may include hardware rental as well as software and services. On-site resources do not include the items listed in the On-site Resources Not Provided section.

Event Analytics

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

Additional Professional Services

Active Network, Events staff can provide the following services to help you achieve the goals of your event.

Software Implementation:

- Software Customization or Integration
- System Architecture
- Web Site Hosting and Management
- Extended Application Hosting
- Software Training

Management:

- Registration Management
- Hotel Management
- Content Management
- Exhibitor Management

Attendee Registration Support:

- Registration Call Center Support
- On-site Registration Help Desk Staff

Financial Services:

- Active Network Merchant Services and Accounting
- Merchant Services Integration

Materials Ordering:

- Badges, Badge Holders, Lanyards and Ribbons

General Guidelines

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

- The detailed requirements, business rules, pricing, etc., needed to configure the software. For most modules, you will submit this information on Implementation Forms that Active will provide.
- Timely approval of content or decisions that are needed by Active to deliver on its assigned duties and tasks.
- Training for your end-users. (Active will train your managers on how to use the management software, but you must provide any needed training for speakers or exhibitors on the tools they use.)
- Event management services.
- Other professional services, unless you contract with Active to provide specific Additional Professional Services.

If you collect and process payments from attendees or exhibitors, your merchant account must use one of the following payment gateway systems to process credit card transactions: VeriSign Payflow Pro, Authorize.Net, JetPay, or Verifi. If another gateway is used, you must pay for Software Customization or Integration services to integrate ActiveWorks Conference with the other gateway.

The content of this document is subject to change without notice. For the latest information, talk with your Sales Representative or your Business Analyst. This document is compatible with ActiveWorks Conference 6.3 released in August 2011. Information in this document may also be compatible with later versions.

Registration

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

- Attendee Registration
- Hotel
- Nomination Tool

Attendee Registration

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

Included Features and Services

Attendee Tools

To register for your event, attendees can:

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

With advanced settings, attendees can also:

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

Management Tools

Registration Managers can:

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

Professional Services

Using information you provide, Active can:

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

After setup is complete, Active can:

- **Train your Registration Manager** on Management tools.

Attendee Registration (continued)

Attendee Tools

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

After registration is complete, attendees can:

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

Management Tools

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

Not Included

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

Attendee Tools

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

- Register for multiple events through a single registration path.
- Reserve a hotel room. (Hotel reservation requests can be made if an additional module is purchased. See Hotel on page 5.)
- Make flight reservations.
- View images related to registration packages.
- Go directly to the Session Scheduler after registering. (The Scheduler can be linked from the My Account page.)

Management Tools

Registration Managers can NOT:

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

Professional Services

Active does NOT:

- Create your event web site (Sold separately. See Web Site Hosting and Management on page 40.)
- Customize branding for individual registration paths.
- Send out payment reminders.
- Train your attendees on how to use the Attendee tools.

Note: If you let attendees pay by credit card, you must also purchase either Active Network Merchant Services and Accounting (see page 49) or Merchant Services Integration (see page 50).

Hotel

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

Included Features and Services

Attendee Tools

Attendees can:

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

With advanced settings, an attendee can also:

- Choose a **roommate**.

After registration is complete, attendees can:

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

Management Tools

A Registration Manager can:

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

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

- A list of rooms and **reservation requests** for each room.
- Reservation request **changes**.
- A **summary** of the rooms requested or still available in a specific sub-block.
- Hotel **reservation request data** such as:
  - Summary of all hotel rooms requested
  - Requested rooms by room type
  - Requested rooms by day
  - Reservation requests that have changed between specific dates
  - Attendees who don't yet have roommates
  - Pick-up counts by hotel and sub-block

Professional Services

Using information you provide, Active can:

- Set up **hotels**, including **rooms**, **descriptions**, **images**, and **pricing**.
- Identify a hotel as "**featured**".
- Set up **sub-blocks** and use **custom fields** or **codes** to identify which users qualify for rooms in a sub-block.
- Set up custom fields that let you gather extra data about a hotel **re**servation request.
- Create **custom reports**.

Active can configure these advanced settings:

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

After setup is complete, Active can:

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

Hotel (continued)

Not Included

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

Attendee Tools

Attendees can NOT:

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

Management Tools

Registration Managers can NOT:

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

Professional Services

Active does NOT:

- Monitor your hotel room pickup or attrition levels.

Nomination Tool

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

Included Features and Services

Nominator and Approver Tools

Nominators can do the following in the Nomination Tool:

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

Approvers can do the following in the Nomination Tool:

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

Management Tools

Registration Managers can do the following:

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

Professional Services

Using information you provide, Active can:

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

After setup is complete, Active can:

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

Not Included

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

Professional Services

Active does NOT:

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

Content

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

- Call for Papers
- Voting
- Session Management
- Speaker Resource Center
- Session Catalog and Personal Scheduler
- Meetings

Call for Papers

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

Included Features and Services

Submitter Tools

People who submit session proposals can:

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

With advanced settings, a submitter may also:

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

Management Tools

Content Managers can:

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

Professional Services

Using information you provide, Active can:

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

After setup is complete, Active can:

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

Call for Papers (continued)

Not Included

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

Management Tools

Content Managers can NOT:

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

Professional Services

Active does NOT:

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

Voting

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

Included Features and Services

Voter Tools

Session voters can:

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

Management Tools

Content Managers can do the following before voting starts:

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

Content Managers can do the following after voting is completed:

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

Professional Services

Using information you provide, Active can:

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

After setup is complete, Active can:

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

Not Included

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

Voter Tools

Session voters can NOT:

- Edit session records.

Management Tools

Content Managers can NOT:

- Approve or reject sessions while viewing the voting results.

Professional Services

Active does NOT:

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

Session Management

Content Managers can manage session records through the Administration Tool.

Included Features and Services

Management Tools

Content Managers can:

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

Professional Services

Using information you provide, Active can:

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

After setup is complete, Active can:

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

Speaker Resource Center® (SRC)

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

Included Features and Services

Speaker & Participant Tools

Approved speakers and other participants can complete these types of tasks:

- **Session tasks** are completed once per session. Examples:
  - Enter or update the abstract
  - Submit audio/visual requirements
  - Enter session profile data (in custom fields)
- **File upload** and **review tasks** are completed for each presentation file. Examples:
  - Upload a PowerPoint file
  - Review the file content
  - Copyedit the file
- **Participant tasks** are completed only once per person per event Examples:
  - Enter or edit speaker biography
  - Register for the event
  - Reserve a hotel room

Additionally:

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

Management Tools

Content Managers can:

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

Professional Services

Using information you provide, Active can:

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

After setup is complete, Active can:

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

Not Included

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

Professional Services

Active does NOT:

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

Session Catalog and Personal Scheduler (SCPS)

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

Included Features and Services

Attendee Tools

The **Session Catalog** area lets attendees:

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

The **Personal Scheduler** area lets attendees:

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

Management Tools

Your Content Manager can:

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

Professional Services

Using information you provide, Active can:

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

After setup is complete, Active can:

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

Not Included

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

Attendee Tools

Attendees can NOT:

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

Management Tools

Content Managers can NOT:

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

Professional Services

Active does NOT:

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

Meetings

The Meetings module lets you manage private meetings that take place during an event. You can manage meeting hosts, topics, approvals, and room assignments.

A registered attendee can use the Meetings tool to:

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

Note: The Meetings module requires that you use the Session Catalog and Personal Scheduler module.

Included Features and Services

Attendee Tools

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

- Log in to the Personal Scheduler and choose any **meeting type** you set up, including the following:
  - A meeting with a Meeting Host to discuss a specific topic
  - A room reservation for a private meeting
- Complete **custom fields** to provide information about the meeting request.
- Choose a **Meeting Host** and/or choose **attendees** to invite to the meeting.
- Request a **length**, **day** and **time** for the meeting.

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

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

Management Tools

A Meeting Approver can do the following:

- View a **list of hosts** for whom there is a pending meeting.
- View the **details** about a meeting request.
- **Approve** or **decline** the request.

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

A Meeting Host can do the following:

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

Event Managers can do the following:

- Allow participants and/or hosts to schedule meetings at times when they have sessions or other meetings already scheduled.
- Require meeting requesters to attend the meetings they request.
- Create a list of **hosts**.
- View **reports** about meetings, such as the meetings scheduled for each day of your event.

Professional Services

Using information you provide, Active can:

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

After setup is complete, Active can:

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

Meetings (continued)

Not Included

For an additional cost, this item may be possible as a custom software update or a custom service.

Professional Services

Active does NOT train attendees on how to request meetings.

Exhibitor

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

- Exhibitor and Sponsor Sales
- Call for Demos
- Exhibitor Tasks

Exhibitor and Sponsor Sales

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

Included Features and Services

Exhibitor Tools

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

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

Management Tools

Your Exhibitor Manager can:

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

Professional Services

Using information you provide, Active can:

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

After setup is complete, Active can:

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

Exhibitor and Sponsor Sales (continued)

Exhibitor Tools

After signing up and being approved, exhibitors can log in to the Exhibitor Resource Center (ERC) web site to complete tasks. (See Exhibitor Tasks on page 18.)

Not Included

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

Management Tools

Exhibitor Managers can NOT:

- Send marketing email messages.

Professional Services

Active does NOT:

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

Note: If you let exhibitors pay by credit card, you must also purchase either Active Network Merchant Services and Accounting (see page 49) or Merchant Services Integration (see page 50).

Exhibitor Tasks

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

Included Features and Services

Exhibitor Tools

Approved exhibitors can complete tasks such as:

- **Update** company information.
- Add or delete **participants**.
- **Register** booth staff and other participants who will attend the event.
- **Reserve hotel rooms** for staff. (Sold separately. See Hotel on page 5.)
- Upload **files**.
- **Reserve equipment** or other resources to use at the event.
- Complete other **custom tasks**.

Management Tools

Exhibitor Managers can:

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

Professional Services

Using information you provide, Active can:

- Create the **categories of data** used in setting exhibitor tasks (such as task types and custom fields).
- Use **custom fields** to create custom pages where participants can complete tasks.
- Create **custom reports**.

After setup is complete, Active can:

- **Train** your Exhibitor Manager on how to create and manage tasks.

Not Included

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

Exhibitor Tools

Exhibitors can NOT:

- View and report on leads.

Professional Services

Active does NOT:

- Train exhibitors on how to complete tasks.

Call for Demos

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

Included Features and Services

Submitter Tools

People who submit session proposals can:

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

With advanced settings, a submitter may also:

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

Management Tools

Content and Exhibitor Managers can:

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

Professional Services

Using information you provide, Active can:

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

After setup is complete, Active can:

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

Not Included

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

Submitter Tools

Submitters do NOT:

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

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

Management Tools

Content Managers can NOT:

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

Professional Services

Active does NOT:

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

ActiveEvents Connect™

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

Included Features and Services

Attendee Tools

A registered attendee can:

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

Speakers can:

- Create a personal **profile**.
- Create a **group**.
- **Communicate** with attendees who indicate interest in their session.

Exhibitor owners can:

- Create a **company profile** or "shop page."
- Link to **YouTube** videos.
- **Upload** documents containing information about their products.
- Link to **sessions** that are relevant for this exhibitor (via custom fields).
- **Communicate with attendees** who indicate interest.
- Post **blog** entries.

Management Tools

An Event Manager can:

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

Professional Services

Using information you provide, Active can:

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

After set up is complete, Active can:

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

Not Included

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

Professional Services

Active does NOT:

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

ActiveEvents Mobile

ActiveEvents Mobile lets registered attendees view event content and interact with other mobile users before and during an event. If you use the Session Catalog and Personal Scheduler (SCPS) module, attendees can use ActiveEvents Mobile to view and update their personal schedules.

Included Features and Services

Attendee Tools

A registered attendee can:
- Search for and view **session and speaker details**.
- View or update his or her **personal session schedule**.
- View details about other **attendees** who “opt in” to Mobile.
- Send **messages** to other Mobile users.
- Search for and view **exhibitor details**.
- Add exhibitors to a **My Exhibitors interest list**.
- Take a **survey**. (Sold separately. See Surveys on page 22.)
- View an **event map**.
- **Find locations near** the event venue.
- View **daily news updates** provided by event planners.

Management Tools

An Event Manager can view an **activity report**.

Professional Services

Using information you provide, Active can:
- Configure **rules** that control who can access Mobile (based on attendee type, registration package, custom field settings, etc.).
- Create **surveys**. (Sold separately. See Surveys on page 22.)
- Create **custom reports** for reviewing custom field data.

After set up is complete, Active can:
- **Train** your Event Manager on how to view Mobile reports.

Not Included

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

Professional Services

Active does NOT:
- Train attendees, speakers, or exhibitors on how to use Mobile.

Surveys

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

Included Features and Services

Attendee Tools

Attendees can:

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

Management Tools

Event Managers can:

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

Professional Services

Using information you provide, Active can:

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

After set up is complete, Active can:

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

Not Included

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

Attendee Tools

Attendees can NOT:

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

Management Tools

Event Managers can NOT:

- View results for different surveys in the same report.

Professional Services

Active does NOT:

- Train attendees on how to complete surveys.

Web Analytics

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

Included Features and Services

Management Tools

Event Managers can:

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

Professional Services

Active can do the following:

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

Not Included

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

Management Tools

Event Managers can NOT:

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

Professional Services

Active does NOT:

- Analyze exhibitor, session, or survey data.

Administration and Reporting Tools

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

Included Features and Services

Management Tools

Event managers can:

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

Professional Services

Active can do the following:

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

Not Included

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

Management Tools

Event Managers can NOT:

- Manage event logistics.

Professional Services

Active does NOT:

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

On-Site Tools

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

- Check-in and Badging
- Mobile Onsite Tools
- Instant Schedule Printing
- Cyber Café Kiosk
- Gift and Materials Distribution
- ActiveEvents Leads
- Session Access Control
- Meetings Access Control (MAC)
- On-Site Server Cluster

If Active provides any of the above on-site tools or services for your event, some general guidelines apply (as explained in On-site Resources Not Provided on page 36).

Check-in and Badging

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

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

Included Hardware, Features and Services

Hardware

Active can provide **rental** of:

- Laptop computers for **Check-in stations**.
- Laptop computers for **Assisted Check-in stations**.

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

Attendee Tools

An attendee can:

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

With advanced settings, attendees can also:

- Answer additional **custom field questions** during check-in.
- Take a **photo** (via web camera) to display on his or her badge.

Management Tools

Registration Managers can:

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

Advanced features:

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

Professional Services

Active can do the following.

To prepare for the event:

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

At the event:

- **Set up hardware** rented from Active.
- **Configure the badge print server** on OASYS to print to your printers.

Check-in and Badging (continued)

Attendee Tools

- Receive their **session schedules** printed on their badges. (Alternatively, the schedule may be **printed** at an Instant Schedule Printing station.)
- Check in at **satellite locations** (such as a hotel or the exhibit hall).

Professional Services

- **Test** check-in, OASYS connectivity, and badge printing.

After the event ends:

- **Take down** hardware rented from Active.

Not Included

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

Hardware & Materials

Active does NOT provide:

- Printers for printing badges.
- Web cameras for capturing badge photos (unless specifically contracted to do so).
- Badge stock. (Sold separately. See Badges, Badge Holders, and Lanyards on page 51.)

Attendee Tools

Attendees can NOT:

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

Professional Services

Active does NOT:

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

Mobile Onsite Tools for Event Organizers

Event administrators can view event statistics and onsite activity from a hand-held mobile device (such as an Android™, Blackberry® Playbook™, or Apple® iPad®.

Note: Onsite Tools for Event Organizers will display reports of data that have been collected through other modules. To view reports on registered attendees, sessions, exhibitors, exhibitor leads, and surveys, you must purchase the associated Conference module: Registration, Content, Exhibitor, ActiveEvents Leads™, or Surveys, respectively.

Included Features and Services

Hardware

Active can provide **rental of Apple iPads**.

Administrator Tools

At the event, event administrators can **view reports and data** for these areas:

- **Key accounts** – Important customers and the ten companies with the most attendee registrations.
- **Exhibitor** – Overview of scanned leads that match exhibitor-targeted demographics.
- **Registration and Check-in** – Checked-in attendees compared to attendees registered by attendee type and report group.
- **Sessions** – Session details and schedule.
- **Attendees** – Attendee answers to profile questions, sessions scheduled and attended, and exhibitor booths visited.
- **Surveys** - Number of surveys taken and percentage of users who chose a certain response.

Administrators and other onsite staff can:

- **Check in** attendees who have registered and paid.
- **Reprint** an attendee badge.

Professional Services

Using information you provide, Active can:

- Specify which companies are **Key Accounts** for this event.
- Help you **configure** exhibitor-targeted demographics.

NOT Included

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

Administrator Tools

Administrators can NOT:

- Add or edit data from iPad Onsite Tools. All data must be set up and managed from within Conference Admin Tool.

Professional Services

Active does NOT:

- Provide staff to check in attendees or reprint badges using iPad Onsite Tools (unless specifically contracted to do so).

Instant Schedule Printing

Instant Schedule Printing prints out an attendee's schedule after his or her badge is scanned.

Note: Instant Schedule Printing requires that you use the Session Catalog and Personal Scheduler module.

Included Features and Services

Hardware

Active can provide **rental of Schedule Printing stations** including:

- Computer
- Barcode reader

Attendee Tools

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

- **Scan** the barcode on his or her badge.
- Pick up the session **schedule** that prints after scanning.

Management Tools

None needed.

Attendees pick up their schedules from a printer without assistance.

Professional Services

Active can do the following:

To prepare for the event:

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

At the event:

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

After the event ends:

- **Take down** print stations provided by Active.

Not Included

Hardware & Materials

Active does NOT provide:

- Rental of printers.
- Printer paper.

Attendee Tools

Attendees can NOT:

- Modify their schedule.

Professional Services

Active does NOT:

- Set up or take down hardware that Active does not provide (unless contracted to do so).
- Set up printers.
- Set up and take down stations or printers each night.
- Provide security for machines left unattended.

Cyber Café Kiosk

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

Included Features and Services

Hardware

Active can provide **rental of Kiosk stations**, including:

- Computer
- Monitor
- Barcode Reader

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

Attendee Tools

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

- Scan a barcode or enter a username and password to **log in**.
- View a **daily message** from your event management staff.
- View and print his or her **schedule**.
- View and respond to on-line **surveys**. (Sold separately. See Surveys on page 22.)
- Access **ActiveEvents Connect**. (Sold separately. See ActiveEvents Connect on page 20.)

Management Tools

Event Managers can do the following:

To prepare for the event:

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

At the event:

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

After the event:

- View survey **reports**.

Professional Services

Active can do the following using information that you provide.

To prepare for the event:

- Customize the **branding** for the Kiosk user interface.
- Configure **rules** that determine which attendees see which surveys. (Sold separately. See Surveys on page 22.)
- Set up the Kiosk to point to **ActiveEvents Connect**. (Sold separately. See ActiveEvents Connect on page 20.)
- **Configure and test hardware** (or create and test a configuration image for you to use to stage your own hardware).
- Verify that attendee badges include the correct **1D barcode** required for kiosk scanning.

At the event:

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

After the event:

- **Take down** the Kiosk stations provided by Active.

Not Included

Hardware & Materials

Active does NOT provide:

- Rental of printers.
- Printer paper.

Attendee Tools

Attendees can NOT:

- Print surveys.

Professional Services

Active does NOT:

- Set up and take down machines that Active does not provide.
- Set up and take down the kiosk machines each night.
- Provide security for kiosk machines left unattended.

Gift and Materials Distribution

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

Included Features and Services

Hardware

Active can provide **rental of Gift Redemption stations**, including:

- Computer
- Monitor
- Barcode reader

On-site Staff Tools

Gift Redemption staff can:

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

The system records when an attendee receives an item.

Management Tools

Event Managers can:

- Provide **images** of the gifts or materials to be distributed.

Professional Services

Active can do the following using information that you provide.

To prepare for the event:

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

At the event:

- **Setup and configure** the Gift stations.

After the event ends:

- **Take down** the Gift stations provided by Active.

Not Included

Professional Services

Active does NOT:

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

ActiveEvents Leads™

ActiveEvents Leads works with the Conference Exhibitor module to help exhibitors collect and develop contact information for existing and future clients.

Included Features and Services

Hardware

Active can provide **rental of lead retrieval units** for exhibitors.

The unit is a Swiftium scanner attached to a Blackberry mobile device. The device provides wireless real-time synchronization of lead data to the exhibitor's record in Conference.

Exhibitor Tools

Exhibitors can do the following.

Before the event:

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

During the event:

- **Scan barcodes** of attendees who visit their booth.
- Indicate attendees' **responses to Yes/No questions**.
- Type in **notes about a lead**.
- **Upload leads** to a web application.

After the event:

- **View leads** in the Exhibitor Resource Center web application. (Sold separately.)
- **Export** leads to Excel, Open Office, or as comma-separated files.

Professional Services

Active can do the following.

To prepare for the event:

- Give you PDF documentation that you can use to **market Lead Retrieval** to your exhibitors.
- **Manage orders** and payments for rental of lead retrieval units.
- **Configure** lead retrieval units.
- Set up **qualifying questions** for specific exhibitors.
- Verify that attendee badges include the correct **1D or 2D barcode** required for lead scanning.

At the event:

- **Distribute** lead retrieval units to your exhibitors.
- Provide **printed instructions** on how to use the unit.

After the event ends:

- **Verify** that leads were uploaded correctly.
- **Email leads** in a file (if the Exhibitor Resource Center is not used for the event).

NOT Included

Exhibitor Tools

Exhibitors can NOT:

- Print out a list of leads directly from the lead retrieval unit.
- Find specific leads by entering search criteria or send email to leads through an application.

Professional Services

Active does NOT:

- Provide security for lead retrieval units left unattended.
- Print out lists of leads for exhibitors.
- Email leads to exhibitors if the Exhibitor Resource Center is being used for the event.

Session Access Control™ (SAC)

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

Included Features and Services

Hardware

Active can provide **rental of SAC stations**, including:

- Computer
- Monitor
- Barcode reader

On-site Staff Tools

Session Access Control staff can:

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

With advanced settings, a SAC staff member can:

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

Management Tools

Event Managers can:

- View **reports** about session attendance.

Professional Services

Active can do the following.

To prepare for the event:

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

At the event:

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

After the event ends:

- **Take down** the SAC stations provided by Active.

Not Included

Hardware

Active does NOT provide:

- Hard-wired networking.

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

Professional Services

Active does NOT:

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

Meetings Access Control (MAC)

Meetings Access Control (MAC) helps you track meeting attendance and reminds meeting participants of the time and location of the next approved meeting on their schedules. A MAC workstation is placed near meeting rooms and is used to scan the badges of meeting participants. Meeting participants may include meeting hosts, speakers, and attendees.

Note: Meetings Access Control requires that you use both the Meetings module and the Session Catalog and Personal Scheduler module. (MAC does *not* work with meetings requested through ActiveEvents Connect.)

Included Features and Services

Hardware

Active can provide **rental of MAC stations**, including:

- Laptop computer
- Barcode reader

On-site Staff Tools

Meetings Access Control staff can:

- **Scan** a meeting participant's badge.
- View the **location** and **time** of a participant's next scheduled meeting.
- View a list of **meeting participants** and see which participants have already scanned in.

With advanced settings, a meeting host can:

- Change the **room location** for a meeting.

Management Tools

Event Managers can:

- View **reports** about meeting attendance.

Professional Services

Active can do the following.

At the event:

- **Place and configure** MAC machines near meeting rooms.
- Provide **training** to the on-site staff member who uses MAC to scan badges.

After the event ends:

- **Take down** the MAC stations provided by Active.

Not Included

Hardware

Active does NOT provide:

- Hard-wired networking.
- Internet connection.

Note: Meeting Access Control (unlike SAC) does not function without an Internet connection.

Professional Services

Active does NOT:

- Provide on-site MAC staff.
- Set up and take down the MAC machine each night.
- Provide security for MAC machines left unattended.

Digital Signage

On-site Digital Signage lets you display event data on flat-screen monitors throughout your event location. For example, monitors may display session details; show speaker or room changes; broadcast keynotes; display event updates; and promote sponsors.

Included Hardware and Services

Hardware

Active can provide:

- Rental of flat-screen monitors with embedded PC. (No laptops needed.) The monitors connect to a central server.

Professional Services

Active can do the following.

To prepare for the event:

- Integrate with Conference or third-party content system.
- Work with the venue and/or client network team to ensure that proper location, connectivity and power requirements are met.
- Ship the monitors to the event venue.

At the event:

- Set up the hardware.
- Display content throughout the venue or to only a specific monitor.
- Configure a split-screen view to show room information, weather, breaking news, etc.

After the event ends:

- Pack and ship the hardware from the venue.

Not Included

Hardware

Active does NOT provide:

- Network infrastructure or internet connectivity. (These must be provided by the client as explained in On-site Resources Not Provided on page 36.)

Professional Services

Active does NOT:

- Configure the data that displays on the monitors, except for the standard event data collected and managed with the Conference modules purchased for the event.

On-Site Server Cluster

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

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

Included Hardware and Services

Hardware

Active can provide:

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

Professional Services

Active can do the following.

To prepare for the event:

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

At the event:

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

After the event ends:

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

Not Included

Hardware

Active does NOT provide:

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

Professional Services

Active does NOT:

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

On-site Resources Not Provided

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

Active Network, Events, does NOT provide:

- PC workstation hardware, servers, and network gear *except* as specifically contracted for individual on-site tools supplied by Active (such as rental of Check-in laptops).
- On-site network services including network backbone, network equipment, technical support, wireless network, Internet access, etc., *except* as provided for in the cost estimate section.
- Furniture or signage of any kind.
- Event management services.
- Physical security of the machines used to deliver on-site services such as Session Access Control (SAC), Check-In, Cyber-Cafe, and Lead Retrieval units.
- On-site PC services, including setting up or taking down Check-In workstations, Cyber-Café Kiosks, or Lead Retrieval units; setting up, managing, or taking down SAC workstations; manual daily updates of SAC workstations; etc., *except* as provided for in the cost estimate section.

Your company must provide to Active Network, Events:

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

Additional Professional Services

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

Software Implementation:

- Software Customization or Integration
- System Architecture
- Web Site Hosting and Management
- Extended Application Hosting
- Software Training

Management:

- Registration Management
- Hotel Management
- Content Management
- Exhibitor Management

Attendee Registration Support:

- Registration Call Center Support
- On-site Registration Help Desk Staff

Financial Services:

- Active Network Merchant Services and Accounting
- Merchant Services Integration

Materials Ordering:

- Badges, Badge Holders, Lanyards and Ribbons

Software Customization or Integration

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

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

Included Services

Professional Services

A Business Analyst will:

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

The Software Development Team will:

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

Your Project Manager will:

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

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

Not Included

Professional Services

Active does NOT:

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

System Architecture

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

Included Services

Professional Services

Active can do the following:

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

Web Site Hosting and Management

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

Included Services

Professional Services

Active can do the following:

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

Not Included

Professional Services

Active does NOT:

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

Extended Application Hosting

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

Included Services

Professional Services

Active can provide the following:

- Housing of Conference software applications in a managed data center during the event.
- Server rental.
- Data center space.
- Managed backups.
- Patch and security management.

Software Training

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

If desired, you can purchase additional training.

Included Services

Professional Services

Active can provide the following:

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

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

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

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

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

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

Not Included

Professional Services

Active does NOT:

- Pay for travel expenses associated with training trips.

Registration Management

If you use any Registration module in Conference, Active can provide Registration Management services to help you create and manage your attendee records and registration processes.

Included Services

Professional Services

Active can do the following before the event:

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

Active can do the following at the event:

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

Active can do the following after the event ends:

- Run reports.

Not Included

Professional Services

Active does NOT:

- Talk directly to your attendees and update registration details in user accounts. (Sold separately. See Registration Call Center Support on page 47.)
- Work at the Registration Desk at your event. (Sold separately. See On-site Registration Help Desk Staff on page 48.)

Hotel Management

If you use the Hotel module in Conference, Active can provide Hotel Management services to help you manage the hotel reservations for your event.

Included Services

Professional Services

Active can do the following before the event:

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

Content Management

If you use any Content module in Conference, Active can provide Content Management services to help you create and manage your session records, speakers, and session schedule.

Included Services

Professional Services

Active can do the following before the event:

- Help your event team identify your project requirements for content (including sessions, speakers, and scheduling).
- Manages content setup and implementation within the Conference software program.
- Manage session room blocking and schedule creation.
- Assist with setup and management of the Speaker Resource Center.
- Assist with session record and event survey creation and deployment. (Surveys are sold separately. See Surveys on page 22.)
- When needed, consult on custom development requirements.
- Oversee the Active project team for content-related activities.
- Run Content reports.
- Assist speakers and other session participants as they complete tasks in the Speaker Resource Center.

Active can do the following at the event:

- Help your event team manage on-site content and speaker-related activities.
- Facilitate on-site content changes, such as room and speaker changes.
- Manage Session Access Control and attendance monitoring. (Session Access Control is sold separately. See Session Access Control on page 32.)

Active can do the following after the event ends:

- Run reports.

Exhibitor Management

If you use any Exhibitor module in Conference, Active can provide Exhibitor Management services to help you manage the exhibitors and sponsors for your event.

Included Services

Professional Services

Active can do the following before the event:

- Help your event team identify your project requirements for exhibitors and sponsors (including exhibit booths, purchase items, pricing, and exhibitor preparation tasks).
- Manage exhibitor/sponsor setup and implementation within the Conference software program.
- Manage exhibitor sales and registration.
- When needed, consult on custom development requirements.
- Oversee the Active project team for exhibitor-related activities.
- Manage sales to exhibitors and sponsors.
- Manage exhibitors and other participants as they complete tasks in the Exhibitor Resource Center (ERC).
- As necessary, update exhibitor and participant records in the Conference Administrator Tool on behalf of exhibitors.
- Coordinate exhibit booth assignments.
- Run Exhibitor reports.

Active can do the following at the event:

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

Active can do the following after the event ends:

- Run reports.

Registration Call Center Support

If you purchase the Attendee Registration module, you can contract with Active to provide customer support to registering attendees before your event.

Included Services

Professional Services

Call Center staff at Active Network, Events, can do the following:

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

Active provides the above services Monday through Friday during the following hours:

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

Active also provides:

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

Not Included

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

Professional Services

Active does NOT:

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

On-site Registration Help Desk Staff

If you purchase the Attendee Registration module, you can contract with Active to help your attendees at your event.

Included Services

Professional Services

Active can do the following at your event:

- Assist attendees with registration and check-in issues.
- Provide assistance with on-site payments, order transfers, and other registration changes.
- If you purchased the Gift and Materials Distribution module, may distribute gifts and materials. (For details, see Gift and Materials Distribution on page 30.)

Not Included

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

Professional Services

Active does NOT:

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

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

Active Network Merchant Services and Accounting

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

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

Included Services

Professional Services

Active can do the following:

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

Not Included

Professional Services

Active does NOT:

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

Note: If you choose to use your own payment gateway, you must pay to integrate Conference software with your merchant service account. (For details, see Merchant Services Integration on page 50.)

Merchant Services Integration

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

Included Services

Professional Services

Active provides default integration with the following payment gateways:

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

Not Included

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

Professional Services

Active does NOT:

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

Badges, Badge Holders, Lanyards and Ribbons

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

Included Services

Professional Services

Active can do the following:

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

Not Included

Professional Services

Active does NOT:

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

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