



IT
THAT
WORKS

FOR CONGRESSES
AND EVENTS

by



covering IT needs for professional societies

CRM

1 Address management

- Relational d-base
- All relations have a unique record number
- Relation / customer types can be defined
- Relations can be linked to an unlimited nr of other relations
 - E.g. a professor can be linked to: home address, hospital, university, ...
- Demographic data available
- Unique UserID and password per relation
- Detailed profiling of relations possible
 - Easy for mail merges, reporting,...
 - Can also be used for individual approach on website
- Advanced search options
- Easy exporting of addresses
- Possibility to merge duplicate relations

2 Document management

- Definition of style sheets
- Easy mail merge possibilities
- Database storage of all outgoing communication (congress independent)
- Plain text or html mail merges

3 ToDo / tasks

- ToDo / task management module
- Tasks responsible vs end responsible
- Possibility to “move” tasks between staff (keeping track of history and events)
- Tasks can be linked to a project
- Tasks can be divided in sub-tasks each having its own responsible and deadlines

4 Helpdesk

- With Sharepoint
- Integration with standard eSupport software (www.kayako.com)

Registration module

1 Individual registration

1.1 General – registration fee

- Registration number consists of project prefix + chronological number
- Advanced price matrix definition
 - Fee setup with detailed GL account info
 - Possibility to define packages
 - Possibility to hold inventory for all extra`s
 - Multi-currency
 - Flexible and advanced VAT setup
 - Registration fee selection linked to dates / deadlines
 - Prices are defined VAT excluded
- Link with member database (i.e. indication of membership nr and member type)
- Automatic reductions for Member of Board, indirect members, ...
- Different ways of payment: bank transfer, credit card, cheque, cash, ...
 - Online credit card authorization from backoffice
- View payment status + info
- Possibility to record if proof of status (or other document) is received

1.2 Extra`s

- Registration of all possible “non-scientific” orders (tours, concert,...)
- Reductions
 - Automatic based on main registration fee
 - Manual
 - Prices can also be entered manually (not only reductions)

1.3 Accompanying persons

- Possibility to enter names of accompanying persons

1.4 Travel

- Arrival date / time – Departure date / time
- Record if transfer is requested
- Keep track of individual flight plan

1.5 Hotel

- (see other sheet)

2 Group registration

- Contact address – invoice address – group name
- Indication of “group pick-up” or “individual pick-up” of badge for groups
- Automatic duplication of registration records
- Online group registrations
 - Group representative requests nr of products
 - Backoffice user creates record
 - Group representative can view / edit group record online

3 General

- Link with invoice module
- Link with document management module (templates per project, history,...)
- One central address database (project independent)
- Project independent reporting / views possible
- Multiple reports and exports available

4 Third Parties

- Have possibility to view records online
 - To each “product” a “supplier” can be linked

5 Onsite registration handling

- Delegates bringing a confirmation letter¹ with barcode
 - Check on due balance
 - Printing of badge and vouchers / tickets
 - System records if badge and vouchers have been printed
 - Badges can be defined per event and customer category
 - Badges can contain barcode
 - Barcode of AP badge can be the one of the delegate
 - Vouchers can contain a barcode (e.g. to record which bags have been distributed)
- Self-Badge Printing terminals

¹ The confirmation letters can be send by mass e-mail. This e-mail will contain an automatic personalized URL. This URL will redirect you to a webpage showing your confirmation letter (with barcode) which you can print and bring onsite.

Accommodation

1 Hotel definition

- Project independent definition of hotels
 - Contact details including “city area” (this enables you to search for all hotels of e.g. “Barcelona”, which will include all hotels of the surroundings of Barcelona)
 - Nr of stars
 - Room types, room numbers
 - Facilities
 - External documents (central document store for all kinds of electronic documents)

2 Contracts

- To be entered per project
- Number of available rooms per room type and per period / date
- Commission fee / percentage
- Room options (breakfast, city tax,...)
- Price indication (per night or per person)
- Deposit and / or invoice information

3 Reservations

- As part of the (online) registration process, one can book a hotel room
 - Staff has a clear overview of room inventory by type at all times
 - Administrator can determine which roomtypes are available for online booking
- Specific templates can be defined for communication with group representatives, delegates, hotel,...
- Hotel can receive detailed rooming lists or view status online via a restricted webpage

Scientific

1 General procedure (quick draft)

- Definition and setup of tentative sessions
- Allocation of reviewers to tentative sessions / topics
- (online) Abstract submission
 - Abstract number consists of prefix and chronological number
 - Editing possible until deadline
 - Tables, graphs, special characters,...
 - Character or word count with possible limitation
 - Entering of keywords (free or fixed keywords) with limitation
- (online) Abstract scoring
 - Can be done in blind mode
 - Abstracts can be read online or printed all at once
 - Scores can be entered in different stages
 - Scores can be given on multiple items (relevancy, style,...)
 - Abstract scores can be recalculated based on weight factors
 - Award selection / indication possible
- Abstract selection meeting
 - Multiple specific reports available
 - Automatic indication of abstracts with discrepant scored
 - Special option to quickly allocate abstracts to a session
- Setup of final program
 - Timeslot, room allocation
 - Session type, Topic, Track / Sub-topic
 - Chairmen, moderators,...
 - Automatic check for double allocation of one abstract
 - Automatic detection of scheduling conflicts
- Allocate (invited) speakers to final program
 - Userfriendly "copy-paste" function
 - Entering of presentation type
 - Follow-up of invitation process
- Abstract renumbering (publication number) process, based on:
 - Day
 - Sequence number of session on that day
 - Sequence number / sort of speaker
- Allocation of presentation number
- Export details for publication
 - Program Book, Abstract book, Author Index, ePoster info, PDA info,...
 - Format: html, InDesign, Xpress,...
 - Exporting of Program in XML via webservice call
- Online publication of programme
 - Grid view, searchable, itinerary planner,...

- Possibility to view programme in grid view (in backoffice application)
- Typical for scientific program is that anything can change up to very last minute
- Linked with registration module
 - Possibility to automatically create registration records for (free) faculty
- Linked with document management module
- Our scientific module is fully integrated with the onsite Speaker Preview Room, PPT recording with online publication and other onsite services.

Financial

1 Tax / VAT

- Flexible and advanced VAT setup possible
 - Per project / location
 - Per product
 - Per customer
- Possibility to enter “legal VAT texts / lines” on invoice

2 Invoicing / credit notes

- Central invoicing module
 - Registration module
 - Membership module
 - Exhibition module
 - Manual invoices
- Partial / incremental invoicing possible (percentages to be entered manually)
- Workflow definition possible
 - Sales records can be put on “ready to invoice” by a user
 - Actual invoicing can be done (periodically) by the financial dept.
- Invoices can be made one-off or in batch
- Invoiced become locked and cannot be amended. They can however, be reprinted at all times.
- Pro Forma invoicing possible
- Unique invoice number (per sales journal) and invoice date
- Invoices are / can be send to the accounting software
 - Automated export
 - Data-exchange (e.g. through webservices or XML)
- Multi-currency
 - Company is defined in “base currency”
 - Projects can be defined in other currencies
 - Exchange rates can be updated at any moment
- Documents (invoice, credit note, request for fund, reminders, ...) can be customized for each event and branch

3 Payments / accounts receivables

- Link with Payment Service Provider (www.ogone.com or other) for immediate and online credit card authorization
 - From Internet (e.g. online registration)
 - From Backoffice
 - Onsite sales
 - Also via Payment Service Provider (from backoffice directly)
 - Register all fin. details and generate export file which can be uploaded on the website of the PSP.

- Payments
 - Bank statements entered in the backoffice
 - Or imported from the accounting software
- Payments are allocated to the registration / invoice records or remain unallocated (pre-payment)
 - One payment can be linked to multiple registration / invoice records
 - The allocation / matching can be done based on invoice number, registration number, credit card authorization number (coming from PSP), name of the relation,...
 - Allocated payments can be un-matched at a later stage

4 Balance sheet overview

- All transactions can be viewed in balance sheet overview
 - Per customer
 - Per project
 - Per company
 - Per date
 - Per accounting code
 - Per bank account
 - ...

Industry activities

1 Sales of products

- Sales of products to exhibitors (square meters, sponsorship items, satellite session, ...)
 - Product database with GL accounting info
- Linked to invoice module
- Linked to registration module for badge printing (incl. barcode if required)
- Linked to document management module

2 Drawing of floorplan

- Floorplan allocation with status (option, confirmed,...)
- Basic drawing of floorplan
 - Online publication
 - Automatic forwarding to URL of exhibitor after clicking on booth

3 Lead retrieval setup

- Integration with exhibition lead retrieval system
- Definition of personalized qualifiers

4 Industry sessions

- Organizer (contact) details
- Record of preferred time slots
- Record of expected number of participants
- Persons to be put in cc when sending a mail merge regarding the industry session
- Definition of question and answers
- Final time slot
- Final topic, speaker list, chairmen, ...

Membership management

1 Member registration record

- Member registration number may consist of prefix + chronological number
- Invoice address – contact address – professional address
- Different ways of payment: bank transfer, credit card, cheque, cash, ...
 - Online credit card authorization from backoffice
- Fee setup (different member types) with detailed GL account info
 - Flexible and advanced VAT setup
 - Prices are defined VAT excluded
- View payment info + status
- Members can be individuals or companies / institutions
- Membership period (from – to)
- Member renewal possibility (one-by-one or in bulk)
- Printing of plastic membership card (credit card format) with barcode
 - Our company also provides the service for printing and distributing these cards
- Link with registration module
 - Possibility to have indication (e.g. ESC Member) on badge
- Link with invoice module

2 Member overview record

- Gives summarized overview of member
 - (Yearly) member registration records
 - Nomination year / election date
 - Start date of membership
 - Indication of “inactivity” (i.e. membership not paid for x years)
 - Payment information + payment status

Onsite services

- Automation of registration process / area
 - Based on barcode scanning
 - Self-registering or with hostesses
- Fully automated Speaker Preview Room
 - Networked system with lecture rooms
 - Technical PPT support and speaker assistance
 - Version control and version tracking
 - Integrated control mechanism for follow-up of presentation-status
 - Application driven screens (desktop of computer is never shown)
 - Possibility to work with cue light system and timer system
- Support of Press centre
- Congress intranet site (“The Zone”)
 - Personal access code per delegate
 - Internet surfing
 - Electronic messaging system
 - Scientific program with itinerary planner
 - Exhibition floorplan with exhibitor info
 - eCard system
 - Printing of personal documents (receipt of payment, certificate of attendance)
 - Viewing of PPT recordings
 - Skype
 - Suggestion box / evaluation / questionnaire
- Electronic messaging system
- Electronic signage
- Entrance control
 - Scanning of badge or voucher
 - RFID
- Exhibition lead retrieval system
 - With personal qualifier sheet per exhibitor
- PPT recordings and online publication
- PDA application
 - Congress info (i.e. “mini-zone”)
- Web- and videocasts
 - E.g. for live surgery

- Hardware rental and onsite support
- Projectmanagement & consultancy (IT and AV)

Technical requirements

1 4D server

- ≥ 2Gb RAM
- ≥ 40 Gb of free disk space
- Win 2003 Server
- Installed in LAN

2 Webserver

- ≥ 2Gb RAM
- ≥ 40 Gb of free disk space
- MS SQL d-base
- Internet Information Server (IIS)
- Win 2003 server
- Installed in LAN

3 Clients

- ≥ 512 Mb RAM
- ≥ 50 Mb of free disk space
- Win XP or higher

4 Remote access

- Port 19813 on your firewall needs to be open for access via 4D client
- Remote access to server via VPN, Terminal Server, Remote Desktop, Citrix,...

cmOffice

ASSOCIATION MANAGEMENT SOFTWARE

cmReg

AUTOMATION OF THE REGISTRATION AREA

cmSlide

AUTOMATED SPEAKER PREVIEW ROOM

cmWebCast

LECTURE RECORDINGS AND ONLINE PUBLICATION

cmLead

EXHIBITOR LEAD RETRIEVAL SYSTEM

cmTrack

ENTRANCE CONTROL AND DELEGATE TRACKING

cmZone

CONGRESS INTRANET WEBSITE

cmPDA

CONGRESS INTRANET WEBSITE FOR PDA

cmSignage

ELECTRONIC SIGNAGE AND DISPLAY SYSTEM

cmRental

RENTAL OF EQUIPMENT

cmConsult

IT/AV CONSULTANCY