EXHIBIT C

US007774221B2

(12) **United States Patent**
Miller et al.

(10) **Patent No.: US 7,774,221 B2**
(45) **Date of Patent: *Aug. 10, 2010**

(54) **SYSTEM AND METHOD FOR A PLANNER**

(75) Inventors: **Greg Miller**, Asbury, NJ (US); **Kevin McMurty**, Basking Ridge, NJ (US); **Jeffrey Brady**, Jersey City, NJ (US)

(73) Assignee: **Advanced Health Media, LLC**, Union City, NJ (US)

(*) Notice: Subject to any disclaimer, the term of this patent is extended or adjusted under 35 U.S.C. 154(b) by 1355 days.

This patent is subject to a terminal disclaimer.

(21) Appl. No.: **10/726,268**

(22) Filed: **Dec. 2, 2003**

(65) **Prior Publication Data**

US 2005/0120052 A1 Jun. 2, 2005

Related U.S. Application Data

(63) Continuation-in-part of application No. 10/440,521, filed on May 16, 2003.

(60) Provisional application No. 60/408,066, filed on Sep. 4, 2002.

(51) **Int. Cl.**
G06F 9/46 (2006.01)

(52) **U.S. Cl.** **705/8**

(58) **Field of Classification Search** 705/8
See application file for complete search history.

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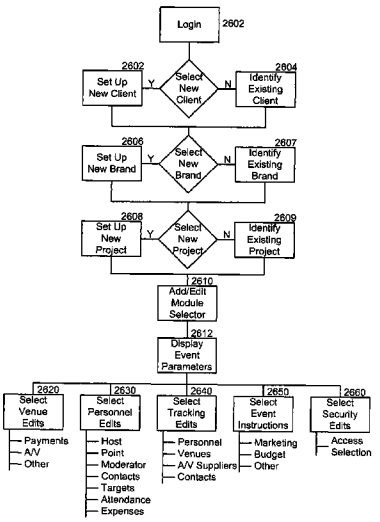
(Continued)

Primary Examiner—Jonathan G. Sterrett
Assistant Examiner—Peter Choi
(74) *Attorney, Agent, or Firm*—Connolly Bove Lodge & Hutz LLC

(57) **ABSTRACT**

A planning system including at least one business rule remote from at least one client, a meeting editor, wherein at least one meeting may be generated for the at least one client by the meeting editor in accordance with at least one of the at least one business rule, and at least one tracker communicatively connected to the meeting editor, wherein the at least one tracker tracks at least two data items selected from the group consisting of invitees to at least one of the at least one meetings, respondents to invitations to the meeting, at least one speaker of the meeting, at least one host of the meeting, finances of the meeting, and a venue of the meeting, and wherein the at least one tracker communicates the at least two data items with the meeting editor.

36 Claims, 85 Drawing Sheets



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2005/0084086	A1	4/2005	Hesse	
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2006/0010023	A1 *	1/2006	Tromczynski et al.	705/8

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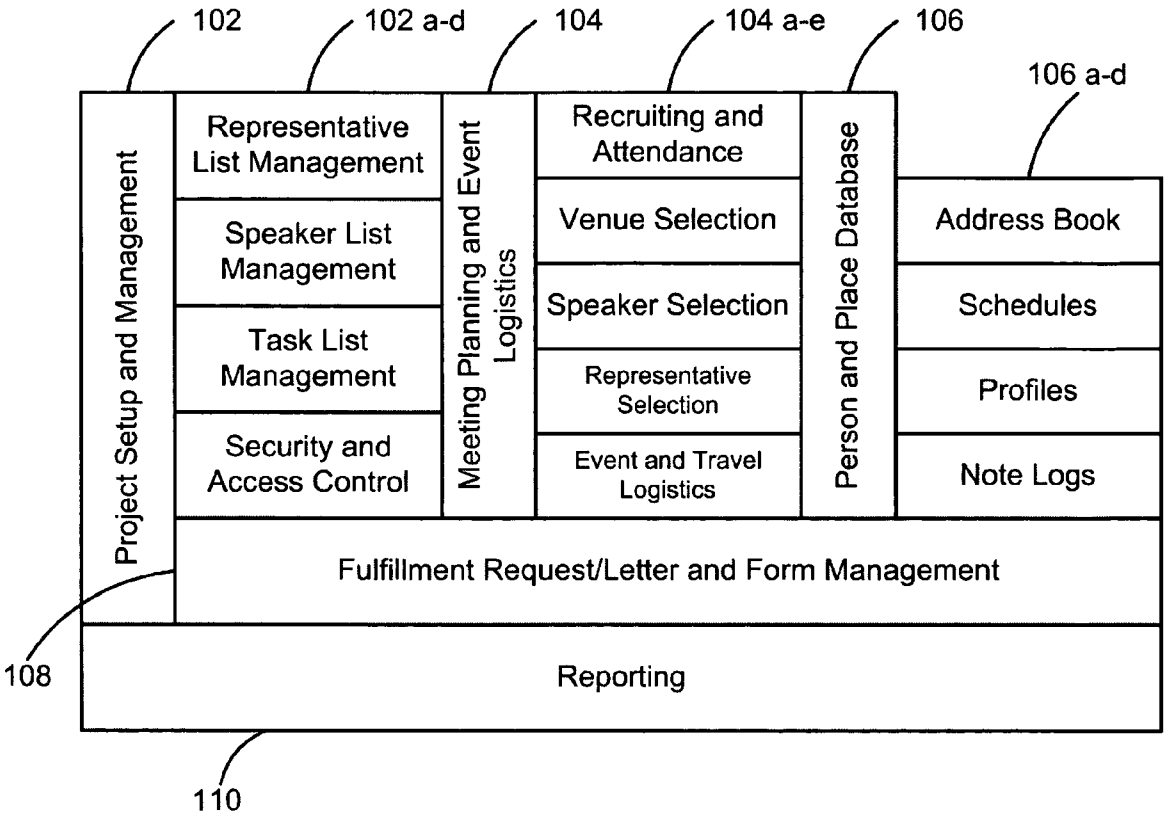

102
102 a-d
104
104 a-e
106
106 a-d
Project Setup and Management
Representative List Management
Speaker List Management
Task List Management
Security and Access Control
Meeting Planning and Event Logistics
Recruiting and Attendance
Venue Selection
Speaker Selection
Representative Selection
Event and Travel Logistics
Person and Place Database
Address Book
Schedules
Profiles
Note Logs
Fulfillment Request/Letter and Form Management
108
Reporting
110

FIGURE 1

MedEd Site: 2003

Home Programs Speakers Topics R ports Profil Documents Help

Welcome to the Website for MedEd Program Management!

is very excited about the pportunity to provide you with turnkey meeting planning services and real-time me ting information via the web!

❖

Have comments or suggestions about this web site?
Great! Please send them to us by filling out the Feedback form.

❖

You can also call

❖

New 2004 Program Requests

We are happy to announce that you may now request 2004 programs. To do this, please select from the Project list below, then click on *Change Project*.

You may switch back to review 2003 programs by selecting the desired project in the list.

Figure 2

Program Information Pages

The following pages can be accessed from the left menu on the Program Details section.

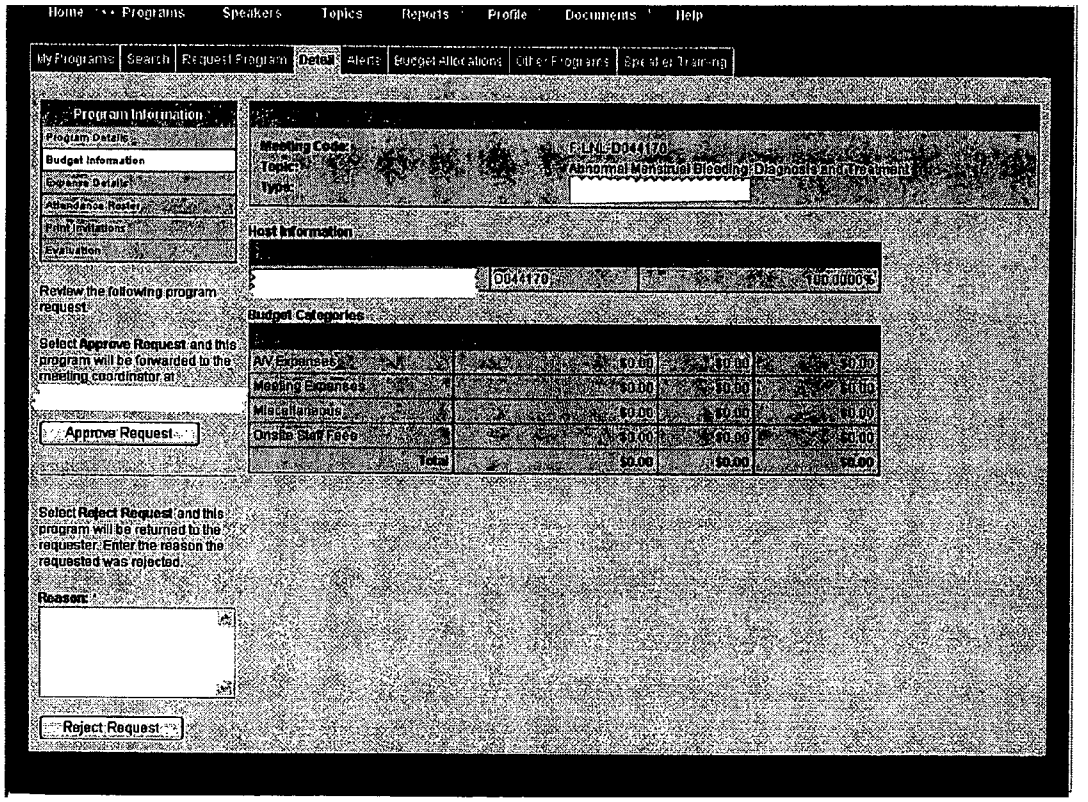


Figure 3

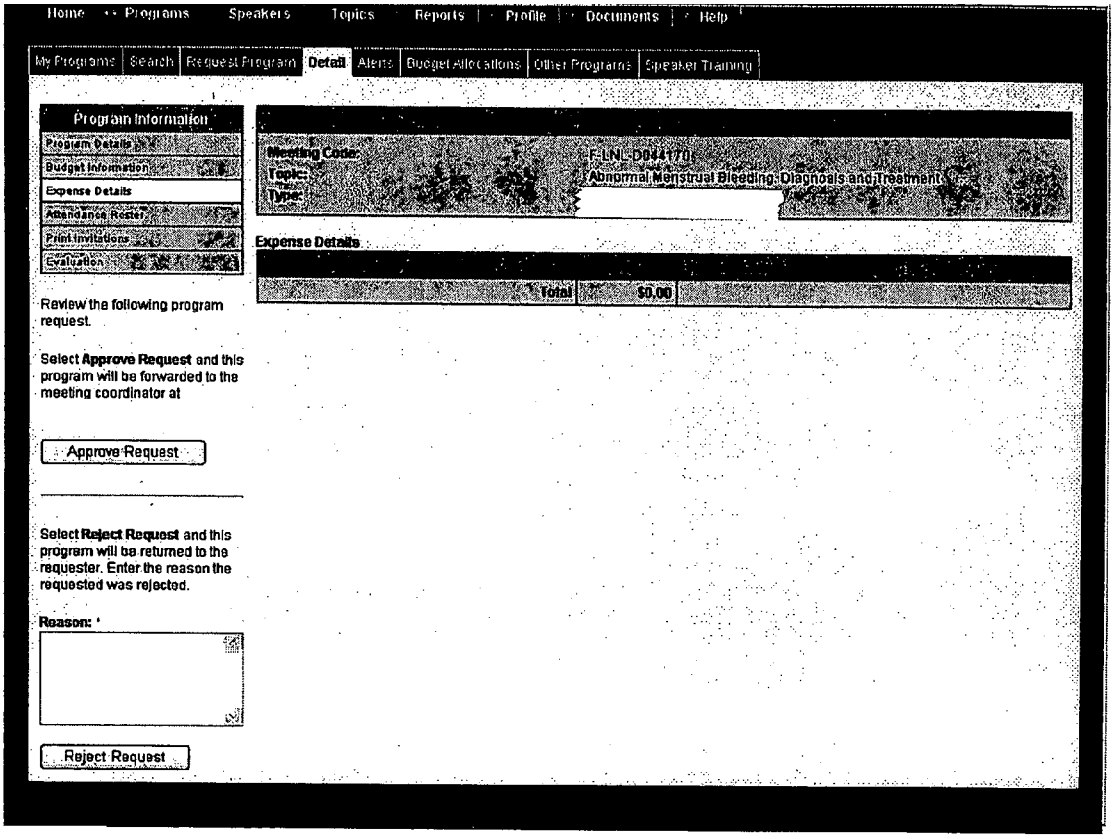

Home
Programs
Speakers
Topics
Reports
Profile
Documents
Help
My Programs
Search
Request Program
Detail
Alerts
Budget Allocations
Other Programs
Speaker Training
Program Information
Budget Information
Expense Details
Attendance Roster
Print Invitations
Evaluation
Meeting Code:
Topic:
Type:
Abnormal Menstrual Bleeding: Diagnosis and Treatment
Expense Details
Total
$0.00
Review the following program request.
Select Approve Request and this program will be forwarded to the meeting coordinator at
Approve Request
Select Reject Request and this program will be returned to the requester. Enter the reason the requested was rejected.
Reason:
Reject Request

FIGURE 4

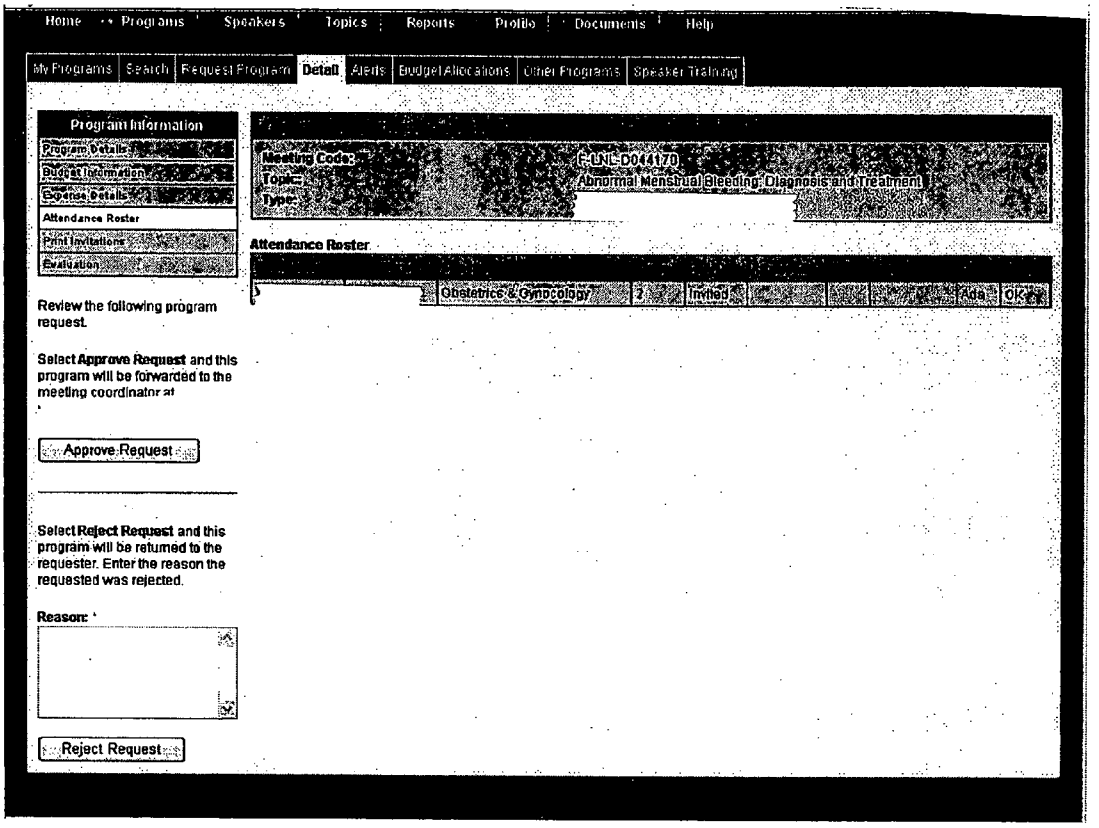

Home
Programs
Speakers
Topics
Reports
Profile
Documents
Help
My Programs
Search
Request Program
Detail
Alerts
Budget Allocations
Other Programs
Speaker Training
Program Information
Program Details
Budget Information
Expense Details
Attendance Roster
Print Invitations
Evaluation
Meeting Code:
F-UNL-D044170
Topic:
Abnormal Menstrual Bleeding: Diagnosis and Treatment
Type:
Attendance Roster
Obstetrics & Gynecology
Invited
Add
OK
Review the following program request.
Select Approve Request and this program will be forwarded to the meeting coordinator at
Approve Request
Select Reject Request and this program will be returned to the requester. Enter the reason the requested was rejected.
Reason:
Reject Request

FIGURE 5

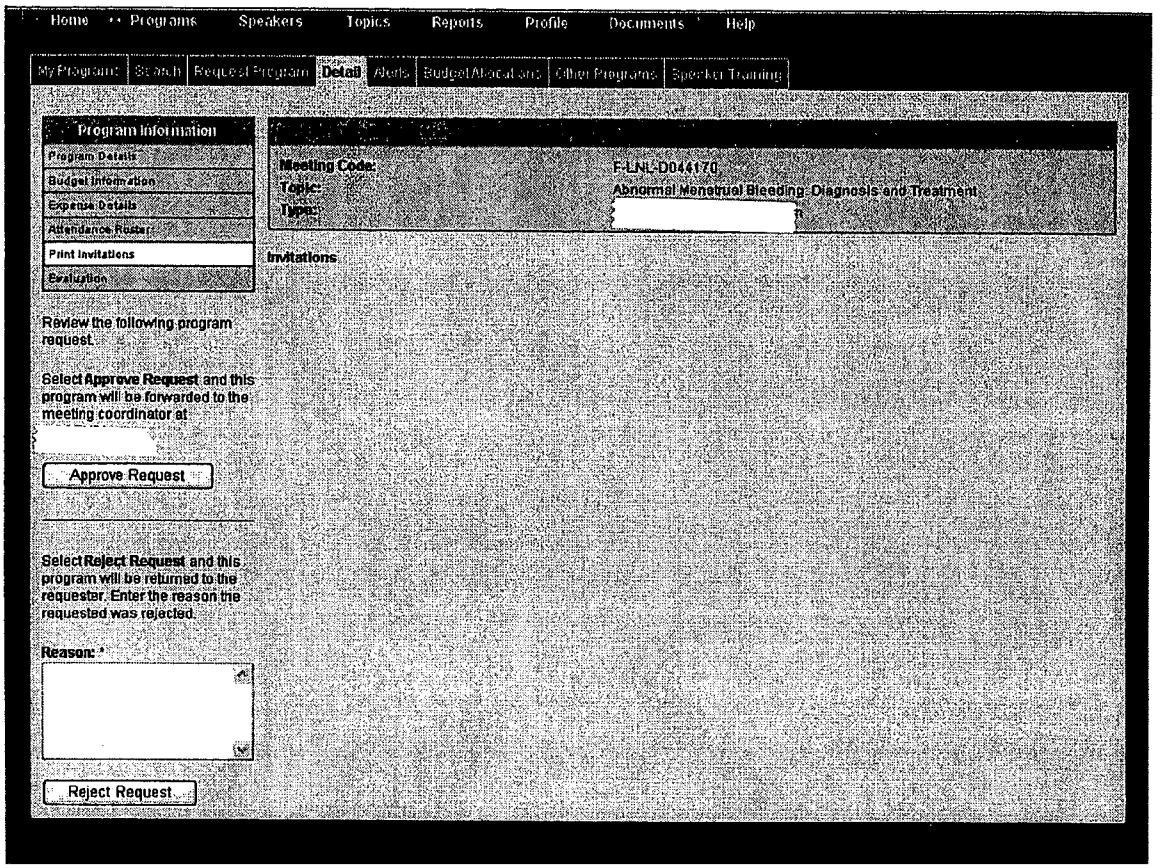

Home
Programs
Speakers
Topics
Reports
Profile
Documents
Help
My Programs
Search
Request Program
Detail
Alerts
Budget/Allocations
Other Programs
Speaker Training
Program Information
Program Details
Budget Information
Expense Details
Attendance Roster
Print Invitations
Evaluation
Meeting Code:
F-LNL-D044170
Topic:
Abnormal Menstrual Bleeding: Diagnosis and Treatment
Type:
Invitations
Review the following program request.
Select Approve Request and this program will be forwarded to the meeting coordinator at
Approve Request
Select Reject Request and this program will be returned to the requester. Enter the reason the requested was rejected.
Reason:
Reject Request

FIGURE 6

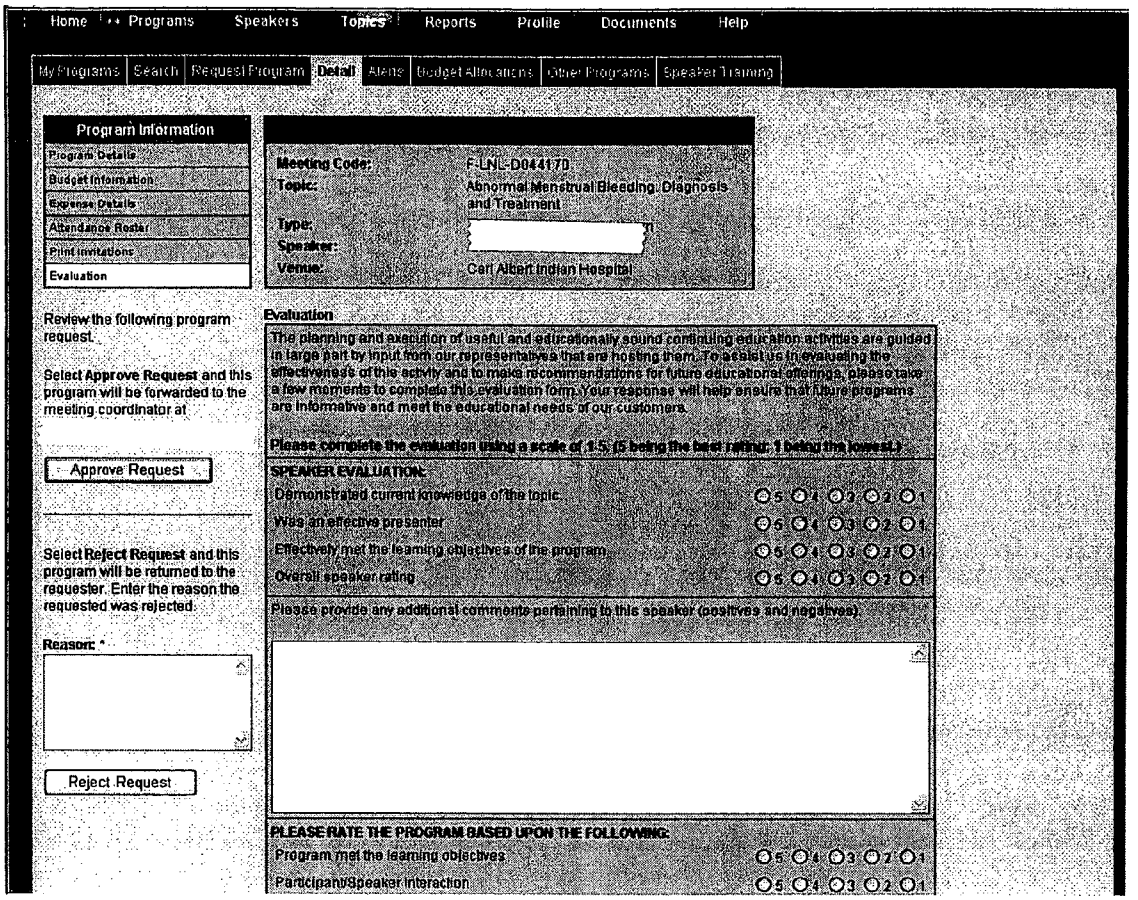

Home
Programs
Speakers
Topics
Reports
Profile
Documents
Help
My Programs
Search
Request Program
Detail
Alerts
Budget Allocations
Other Programs
Speaker Training
Program Information
Program Details
Budget Information
Expense Details
Attendance Roster
Print Invitations
Evaluation
Meeting Code:
F-LNL-D044170
Topic:
Abnormal Menstrual Bleeding: Diagnosis and Treatment
Type:
Speaker:
Venue:
Carl Albert Indian Hospital
Review the following program request.
Select Approve Request and this program will be forwarded to the meeting coordinator at
Approve Request
Select Reject Request and this program will be returned to the requester. Enter the reason the requested was rejected.
Reason: *
Reject Request
Evaluation
The planning and execution of useful and educationally sound continuing education activities are guided in large part by input from our representatives that are hosting them. To assist us in evaluating the effectiveness of this activity and to make recommendations for future educational offerings, please take a few moments to complete this evaluation form. Your response will help ensure that future programs are informative and meet the educational needs of our customers.
Please complete the evaluation using a scale of 1-5 (5 being the best rating; 1 being the lowest.)
SPEAKER EVALUATION:
Demonstrated current knowledge of the topic
Was an effective presenter
Effectively met the learning objectives of the program
Overall speaker rating
Please provide any additional comments pertaining to this speaker (positives and negatives).
PLEASE RATE THE PROGRAM BASED UPON THE FOLLOWING:
Program met the learning objectives
Participant/Speaker interaction

FIGURE 7

Search

The following search section has been added in November.

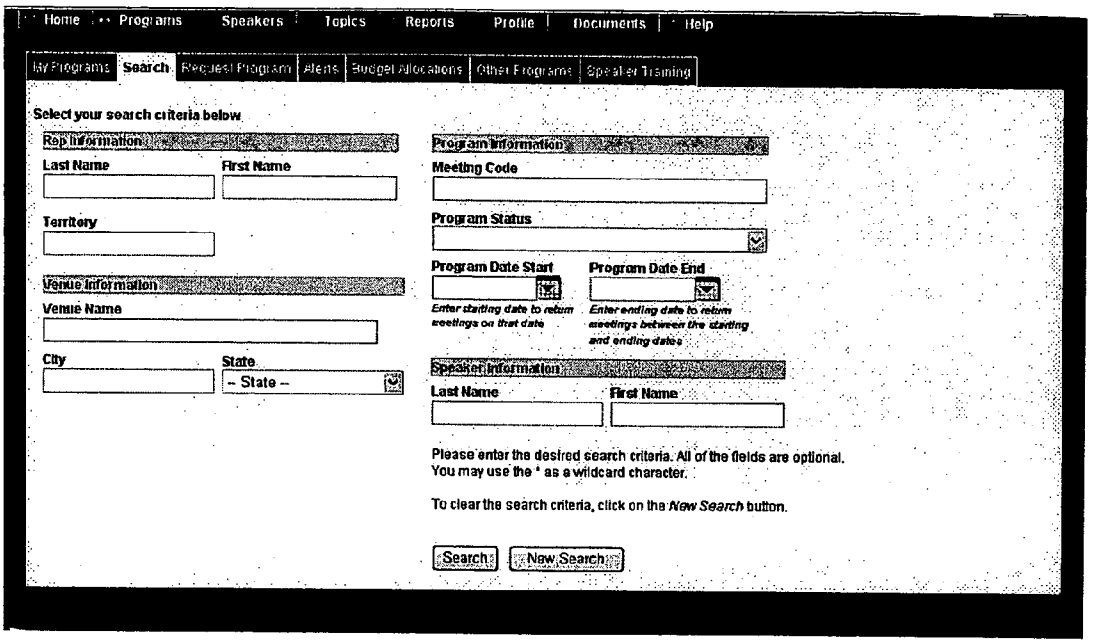


FIGURE 8

Recaptured Screens

The screens in this section are already present in the Berlex patent. However, many were missing data, so I re-captured them with better data. You can use them if you think it will better explain the functionality.

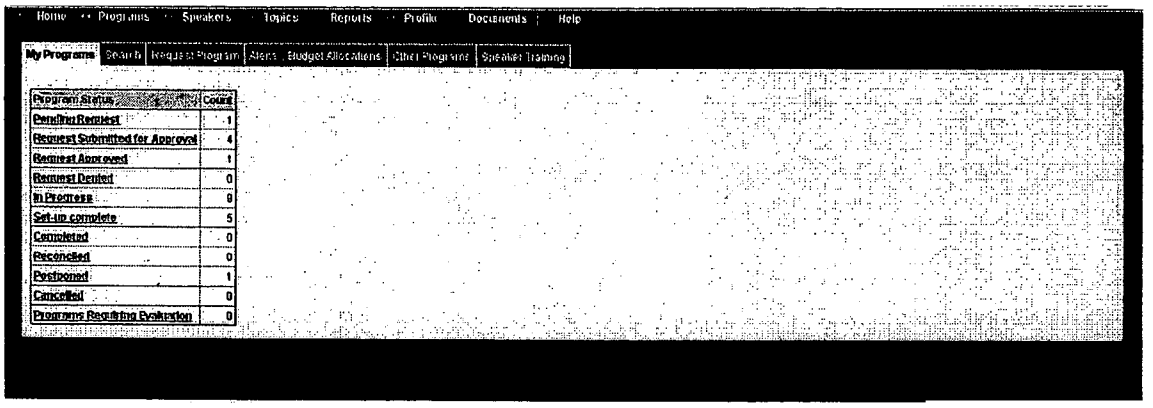


FIGURE 9

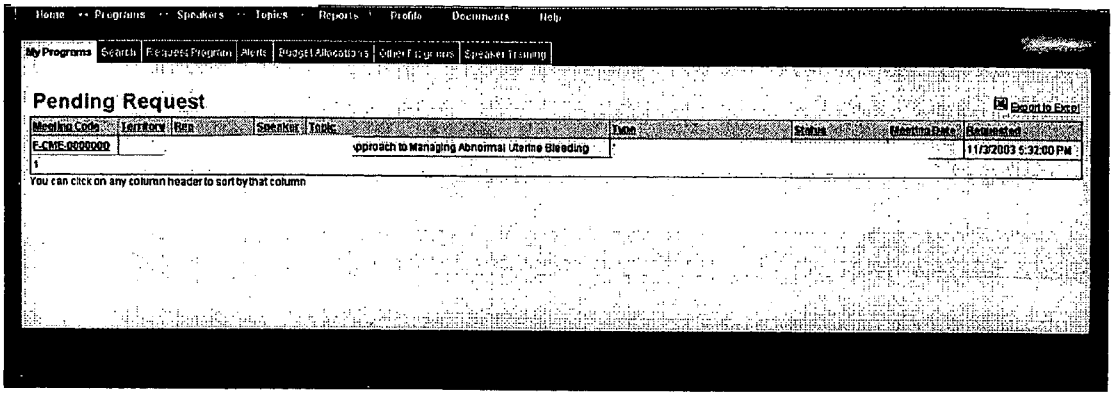
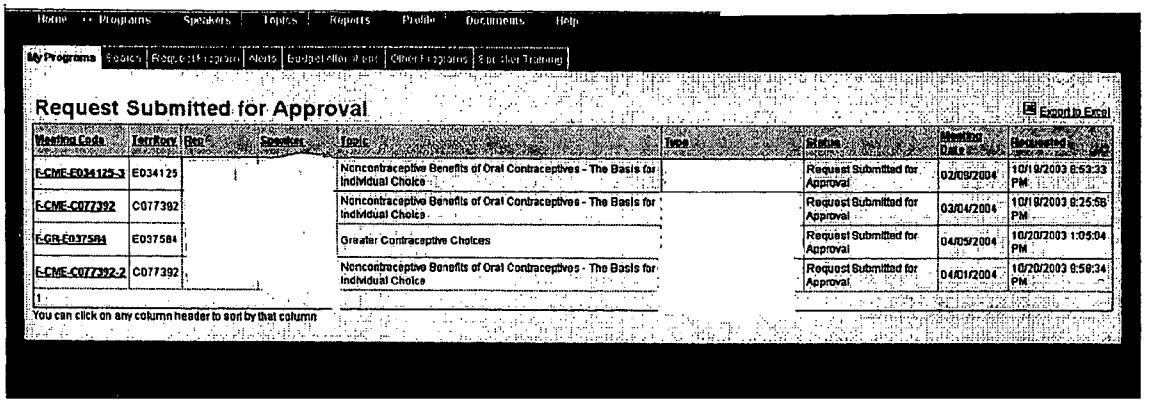

Home
Programs
Speakers
Topics
Reports
Profile
Documents
Help
My Programs
Search
Pending Request
Export to Excel
Meeting Code
Territory
Rep
Speaker
Topic
Type
Status
Meeting Date
Requested
E-CME-0000000
pproach to Managing Abnormal Uterine Bleeding
11/3/2003 5:32:00 PM
You can click on any column header to sort by that column

FIGURE 10



Home Programs Speakers Topics Reports Profile Documents Help

My Programs | Events | Request Approval | Alerts | Budget Allocation Report | Other Programs | Speaker Training

Request Submitted for Approval

Export to Excel

Meeting Code	Territory	Rep	Speaker	Topic	Type	Status	Meeting Date	Requested
E-CME-E034125-3	E034125			Noncontraceptive Benefits of Oral Contraceptives - The Basis for Individual Choice		Request Submitted for Approval	02/09/2004	10/19/2003 6:53:33 PM
E-CME-C077392	C077392			Noncontraceptive Benefits of Oral Contraceptives - The Basis for Individual Choice		Request Submitted for Approval	03/04/2004	10/19/2003 6:25:58 PM
E-GR-E037584	E037584			Greater Contraceptive Choices		Request Submitted for Approval	04/05/2004	10/20/2003 1:05:04 PM
E-CME-C077392-2	C077392			Noncontraceptive Benefits of Oral Contraceptives - The Basis for Individual Choice		Request Submitted for Approval	04/01/2004	10/20/2003 6:59:34 PM

1

You can click on any column header to sort by that column

FIGURE 11

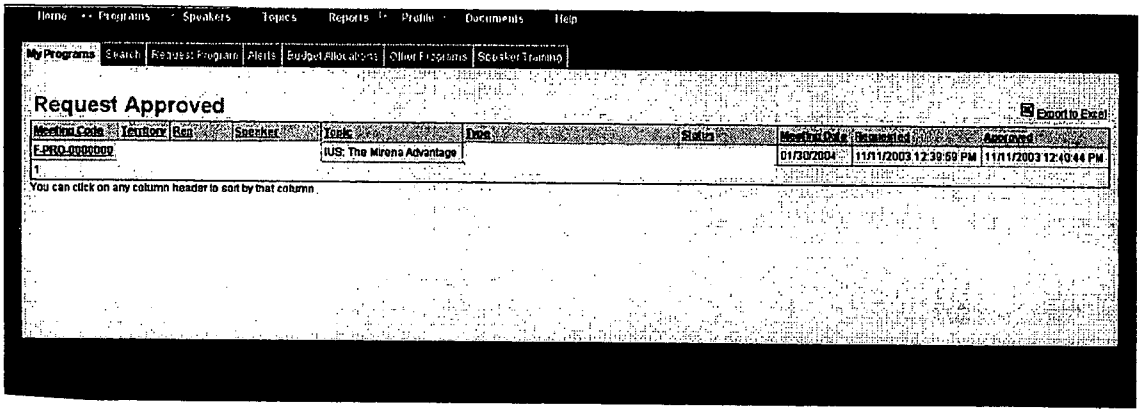

Home
Programs
Speakers
Topics
Reports
Profile
Documents
Help
My Programs
Search
Request Program
Alerts
Budget Allocations
Other Programs
Speaker Training
Request Approved
Export to Excel
Meeting Code
Territory
Rep
Speaker
Topic
Date
Status
Meeting Date
Requested
Approved
F-PRO-0000009
IUS: The Mirena Advantage
01/30/2004
11/11/2003 12:39:59 PM
11/11/2003 12:40:44 PM
1
You can click on any column header to sort by that column.

FIGURE 12

Home Programs Speakers Topics Reports Profile Documents Help

My Programs Search Requested Programs Alerts Program Nominations Program Attendees Other Programs Speaker Certification

Request Denied

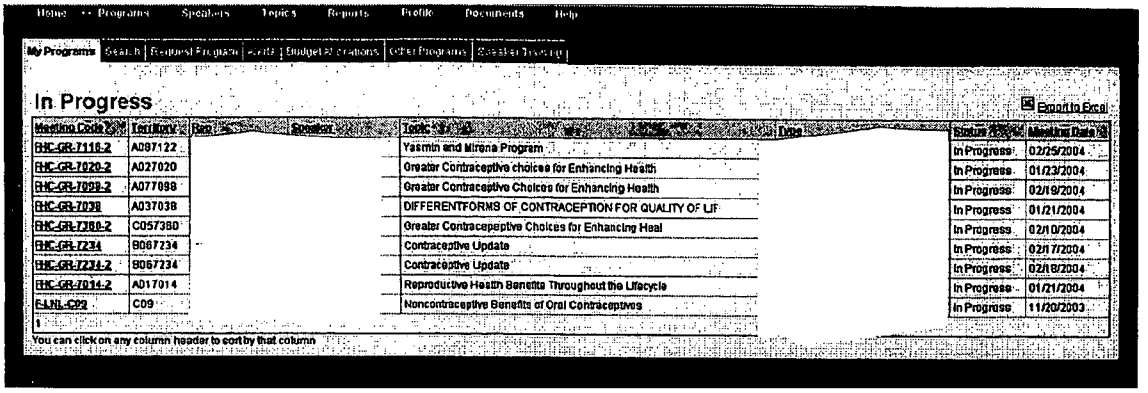
Export to Excel

Meeting Code	Teachable	Title	Session	Topic	Type	Status	Meeting Date	Requested
FHC-PRO-A077102	A077102			IUS: The Mirena Advantage		Request Denied	02/18/2003	1/18/2003 8:52:47 PM
FHC-CSC-A014010				Demystifying PMS: The Chemical/Hormonal Spectrum		Request Denied	03/06/2003	1/24/2003 10:24:40 AM
FHC-CSC-A037036	A037036			Demystifying PMS: The Chemical/Hormonal Spectrum		Request Denied	04/08/2003	2/9/2003 6:49:38 PM
FHC-CME-B017154.2	B017154			Greater Contraceptive Choices for Enhancing Health-Related Quality of Life		Request Denied	05/14/2003	4/7/2003 10:59:42 PM
FHC-GR-A067088	A067088			HRT- the estrogen controversy since WHI		Request Denied	04/16/2003	2/19/2003 4:44:15 PM
FHC-CSC-A037036.2	A037036			Demystifying PMS: The Chemical/Hormonal Spectrum		Request Denied	03/19/2003	2/24/2003 6:21:08 PM
FHC-CME-D037484	D037484			Greater Contraceptive Choices for Enhancing Health-Related Quality of Life		Request Denied	03/07/2003	2/28/2003 5:13:08 PM
FHC-CME-A037036	A037036			Greater Contraceptive Choices for Enhancing Health-Related Quality of Life		Request Denied	04/29/2003	3/4/2003 10:44:15 PM
FHC-PRO-E087676	E087676			IUS: The Mirena Advantage		Request Denied	05/29/2003	4/2/2003 5:52:00 PM
FHC-CME-A037040-37	A037040			Greater Contraceptive Choices for Enhancing Health-Related Quality of Life		Request Denied	04/30/2003	3/5/2003 9:22:44 PM

1 2 3 4

You can click on any column header to sort by that column

FIGURE 13



Home Programs Speakers Topics Reports Profile Documents Help

My Programs | Search | Request Program | Budget Allocations | Other Programs

In Progress

Export to Excel

Meeting Code	Territory	Rep	Speaker	Topic	Type	Status	Meeting Date
FHC-GR-7116-2	A097122			Yasmin and Mirena Program		In Progress	02/25/2004
FHC-GR-7020-2	A027020			Greater Contraceptive choices for Enhancing Health		In Progress	01/23/2004
FHC-GR-7099-2	A077098			Greater Contraceptive Choices for Enhancing Health		In Progress	02/19/2004
FHC-GR-7038	A037038			DIFFERENTFORMS OF CONTRACEPTION FOR QUALITY OF LIF		In Progress	01/21/2004
FHC-GR-7380-2	C057380			Greater Contracepeptive Choices for Enhancing Heal		In Progress	02/10/2004
FHC-GR-7234	B067234			Contraceptive Update		In Progress	02/17/2004
FHC-GR-7234-2	B067234			Contraceptive Update		In Progress	02/18/2004
FHC-GR-7014-2	A017014			Reproductive Health Benefits Throughout the Lifecycle		In Progress	01/21/2004
E-LNL-CP2	C09			Noncontraceptive Benefits of Oral Contraceptives		In Progress	11/20/2003

1

You can click on any column header to sort by that column

FIGURE 14

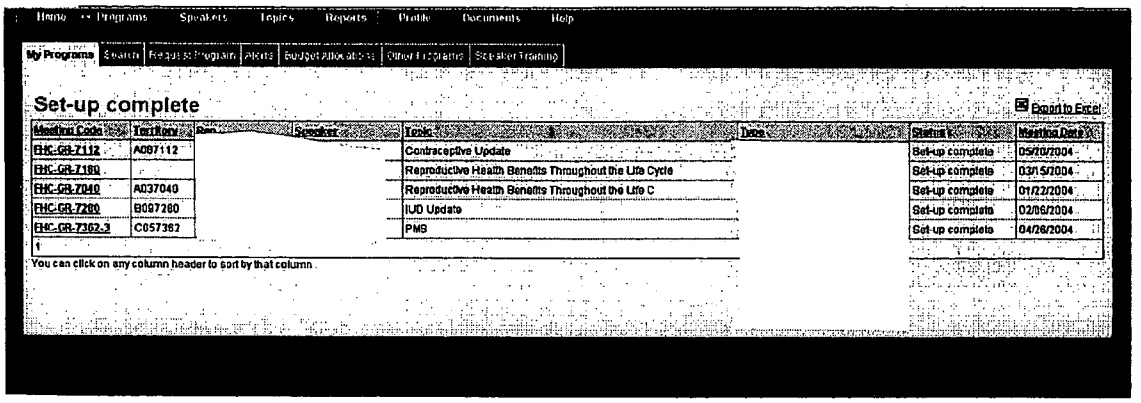

Home
Programs
Speakers
Topics
Reports
Profile
Documents
Help
My Programs
Set-up complete
Export to Excel
Meeting Code
Territory
Speaker
Topic
Date
Status
Meeting Date
FHC-GR-7112
A097112
Contraceptive Update
Set-up complete
05/20/2004
FHC-GR-7180
Reproductive Health Benefits Throughout the Life Cycle
Set-up complete
03/15/2004
FHC-GR-7040
A037040
Reproductive Health Benefits Throughout the Life C
Set-up complete
01/22/2004
FHC-GR-7280
B097280
IUD Update
Set-up complete
02/06/2004
FHC-GR-7362-3
C057362
PMS
Set-up complete
04/26/2004
You can click on any column header to sort by that column.

FIGURE 15

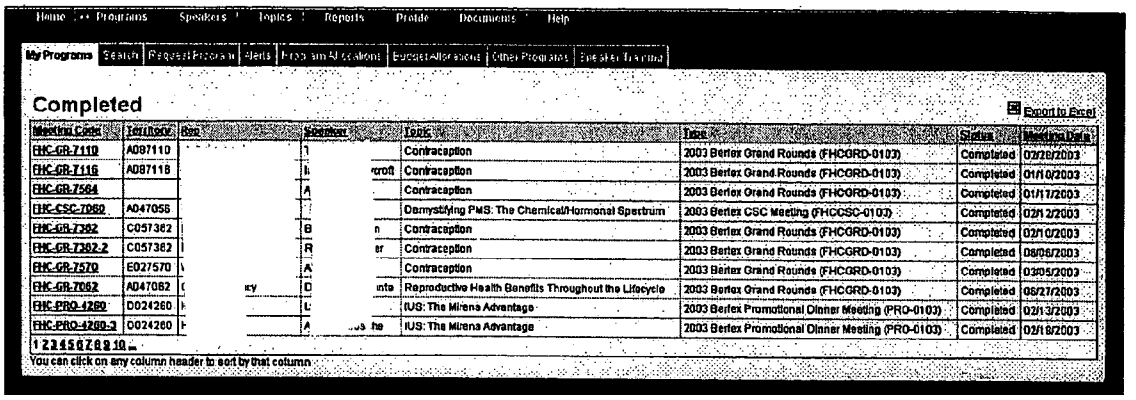

Home
Programs
Speakers
Topics
Reports
Provide
Documents
Help
My Programs
Search
Alerts
Completed
Export to Excel
Meeting Code
Speaker
Topic
Type
Status
Meeting Date
FHC-GR-7110 A087110 Contraception 2003 Berlex Grand Rounds (FHCGRD-0103) Completed 02/26/2003
FHC-GR-7116 A087118 Contraception 2003 Berlex Grand Rounds (FHCGRD-0103) Completed 01/10/2003
FHC-GR-7584 Contraception 2003 Berlex Grand Rounds (FHCGRD-0103) Completed 01/17/2003
FHC-CSC-7060 A047056 Demystifying PMS: The Chemical/Hormonal Spectrum 2003 Berlex CSC Meeting (FHCCSC-0103) Completed 02/12/2003
FHC-GR-7362 C057362 Contraception 2003 Berlex Grand Rounds (FHCGRD-0103) Completed 02/10/2003
FHC-GR-7362-2 C057362 Contraception 2003 Berlex Grand Rounds (FHCGRD-0103) Completed 08/06/2003
FHC-GR-7570 E027570 Contraception 2003 Berlex Grand Rounds (FHCGRD-0103) Completed 03/05/2003
FHC-GR-7062 A047062 Reproductive Health Benefits Throughout the Lifecycle 2003 Berlex Grand Rounds (FHCGRD-0103) Completed 05/27/2003
FHC-PRO-4260 D024260 IUS: The Mirena Advantage 2003 Berlex Promotional Dinner Meeting (PRO-0103) Completed 02/13/2003
FHC-PRO-4260-3 D024260 IUS: The Mirena Advantage 2003 Berlex Promotional Dinner Meeting (PRO-0103) Completed 03/18/2003
1 2 3 4 5 6 7 8 9 10 ...
You can click on any column header to sort by that column

FIGURE 16

Home Programs Speakers Topics Reports Profile Documents Help

My Programs Request Program Alerts Program Allocations Budget Allocations Other Programs Speaker Training

Reconciled

Export to Excel

There are no programs of this status currently in your territory.

Figure 17

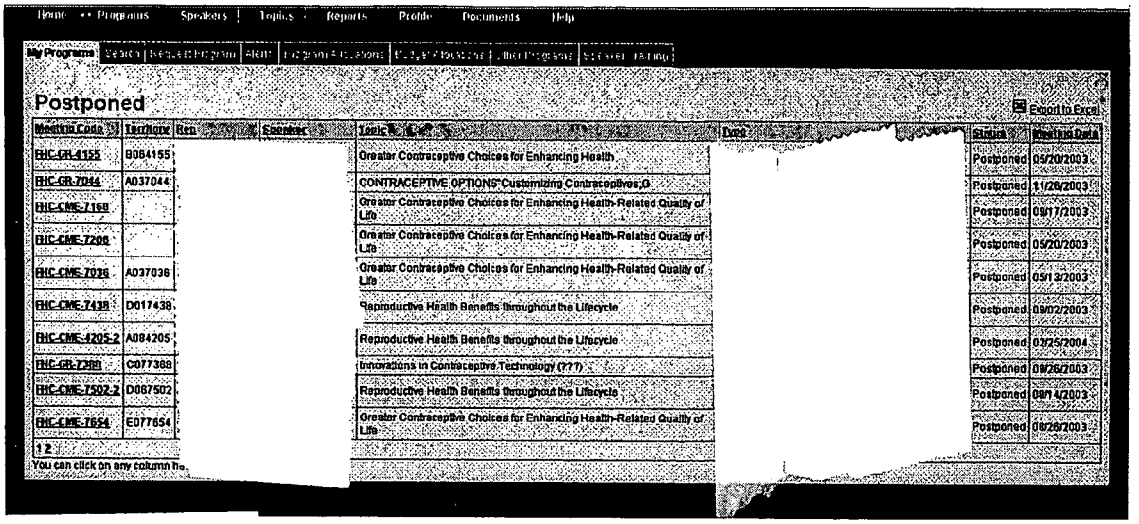

Home
Programs
Speakers
Topics
Reports
Profile
Documents
Help
My Programs
Postponed
Export to Excel
Meeting Code
Territory
Rep
Speaker
Topic
Date
Status
Meeting Date
FHC-GR-4155
B084155
Greater Contraceptive Choices for Enhancing Health
Postponed
05/20/2003
FHC-GR-7044
A037044
CONTRACEPTIVE OPTIONS"Customizing Contraceptives;O
Postponed
11/20/2003
FHC-CME-7168
Greater Contraceptive Choices for Enhancing Health-Related Quality of Life
Postponed
09/17/2003
FHC-CME-7208
Greater Contraceptive Choices for Enhancing Health-Related Quality of Life
Postponed
05/20/2003
FHC-CME-7026
A037036
Greater Contraceptive Choices for Enhancing Health-Related Quality of Life
Postponed
09/13/2003
FHC-CME-7438
D017438
Reproductive Health Benefits throughout the Lifecycle
Postponed
09/02/2003
FHC-CME-4205-2
A084205
Reproductive Health Benefits throughout the Lifecycle
Postponed
03/25/2004
FHC-GR-7380
C077368
Innovations in Contraceptive Technology (???)
Postponed
09/26/2003
FHC-CME-7502-2
D067502
Reproductive Health Benefits throughout the Lifecycle
Postponed
09/14/2003
FHC-CME-7654
E077654
Greater Contraceptive Choices for Enhancing Health-Related Quality of Life
Postponed
08/29/2003
1 2
You can click on any column he

FIGURE 18

Home Programs Speakers Topics Reports Profile Documents Help

My Programs | Search | Forecast Program | Alerts | Program Allocations | Budget Allocations | Other Programs | Speaker Training

Cancelled

Export to Excel

Meeting Code #	Territory	Rep	Speaker	Topic	Year	Type	Status	Meeting Date
FHC-CSC-7068-2	A057068			Demystifying PMS: The Chemical/Hormonal Spectrum	2003	CSC Meeting (FHCCSC-0103)	Cancelled	06/26/2003
FHC-GR-7114	A087114			Contraception	2003	Grand Rounds (FHCGRD-0103)	Cancelled	05/07/2003
FHC-PRO-7390	C077390				2003	Promotional Dinner Meeting (PRO-0103)	Cancelled	02/21/2003
FHC-CSC-7060-2	A047056			Demystifying PMS: The Chemical/Hormonal Spectrum	2003	CSC Meeting (FHCCSC-0103)	Cancelled	01/21/2003
FHC-CSC-7060-3	A047056			Demystifying PMS: The Chemical/Hormonal Spectrum	2003	CSC Meeting (FHCCSC-0103)	Cancelled	02/27/2003
FHC-CSC-7060-4	A047056			Demystifying PMS: The Chemical/Hormonal Spectrum	2003	CSC Meeting (FHCCSC-0103)	Cancelled	02/07/2003
FHC-PRO-4260-2	D024260			IUS: The Mirena Advantage	2003	Promotional Dinner Meeting (PRO-0103)	Cancelled	01/31/2003
FHC-CSC-7098	A077098			Demystifying PMS: The Chemical/Hormonal Spectrum	2003	CSC Meeting (FHCCSC-0103)	Cancelled	01/28/2003
FHC-CSC-7098-3	A077098			Demystifying PMS: The Chemical/Hormonal Spectrum	2003	CSC Meeting (FHCCSC-0103)	Cancelled	02/04/2003
FHC-GR-7098	A077098			Contraception	2003	Grand Rounds (FHCGRD-0103)	Cancelled	04/30/2003

1 2 3 4 5 6

You can click on any column header to sort by that column

FIGURE 19

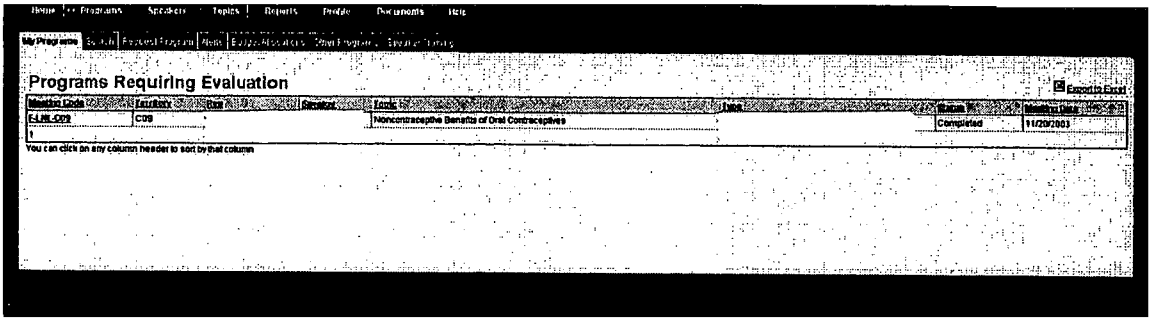

Programs Requiring Evaluation
Nonconceptive Benefits of Oral Contraceptives
Completed
You can click on any column header to sort by that column

FIGURE 20

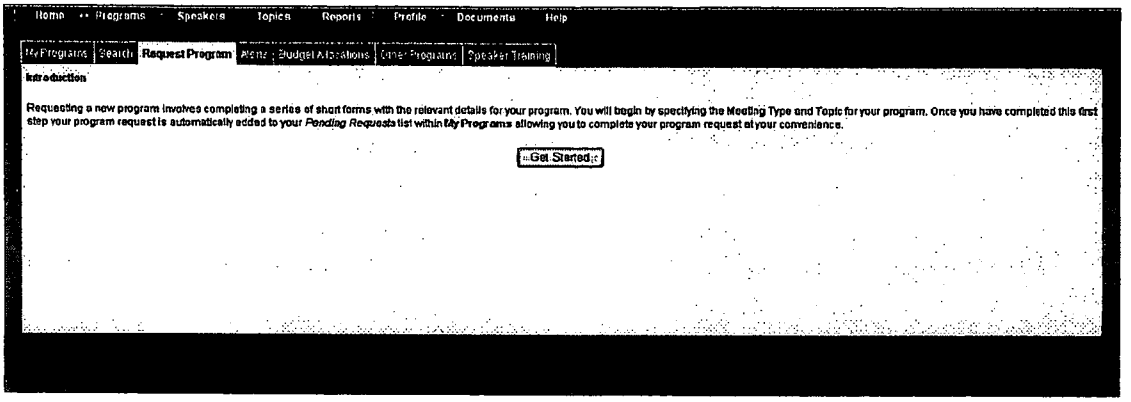


Figure 21A

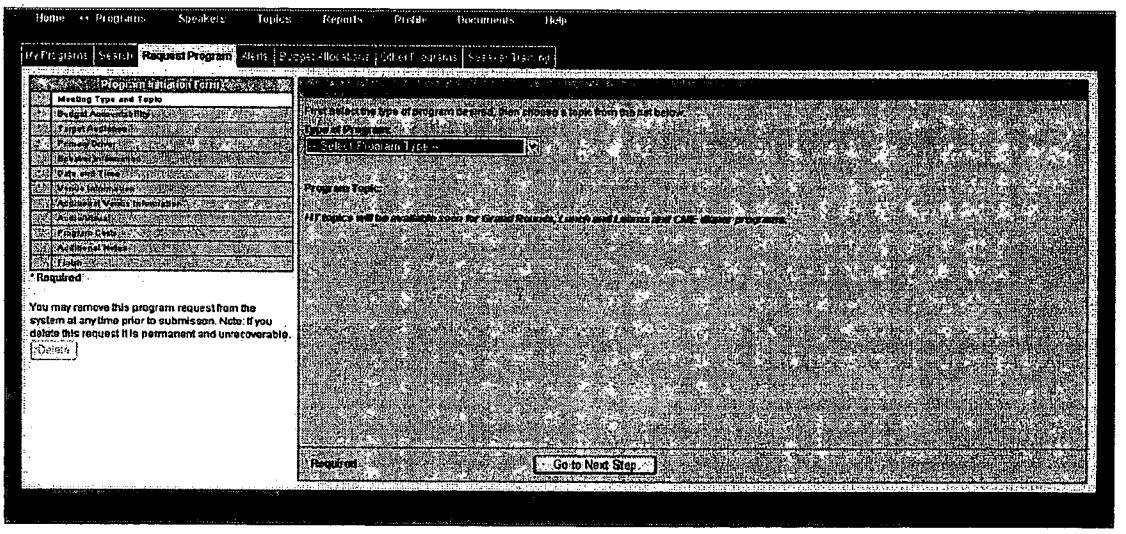


Figure 21B

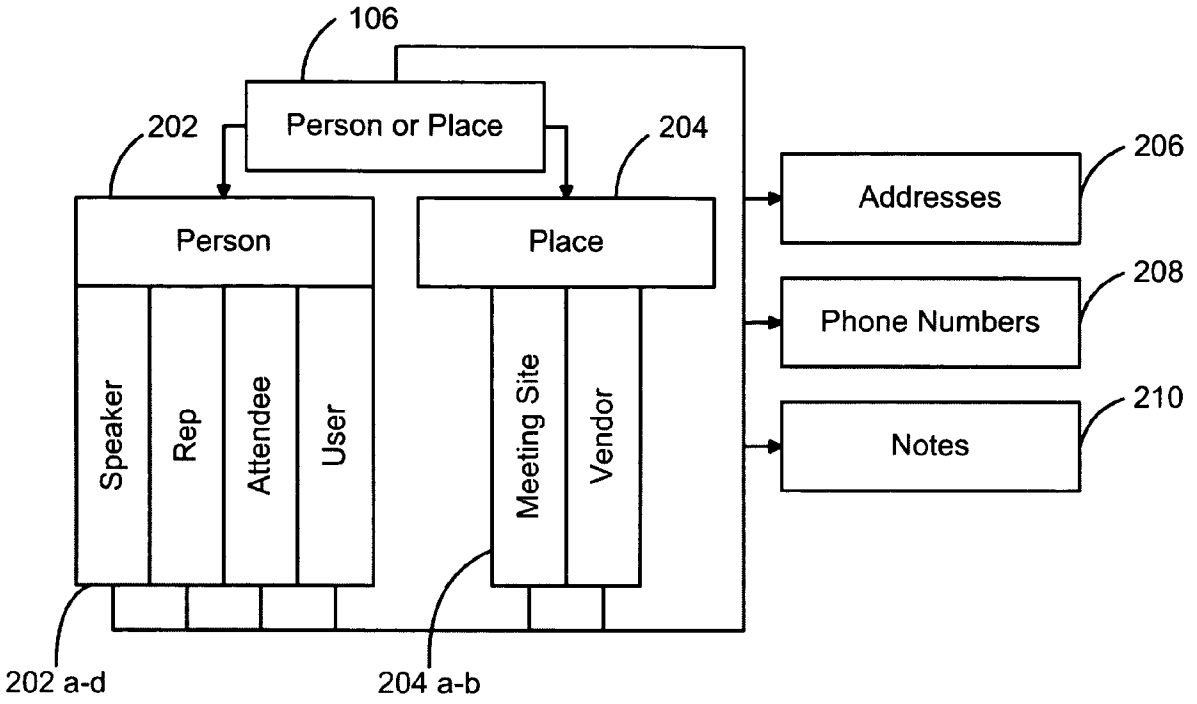

106
Person or Place
202
204
Person
Place
Speaker
Rep
Attendee
User
Meeting Site
Vendor
Addresses
206
Phone Numbers
208
Notes
210
202 a-d
204 a-b

FIGURE 22

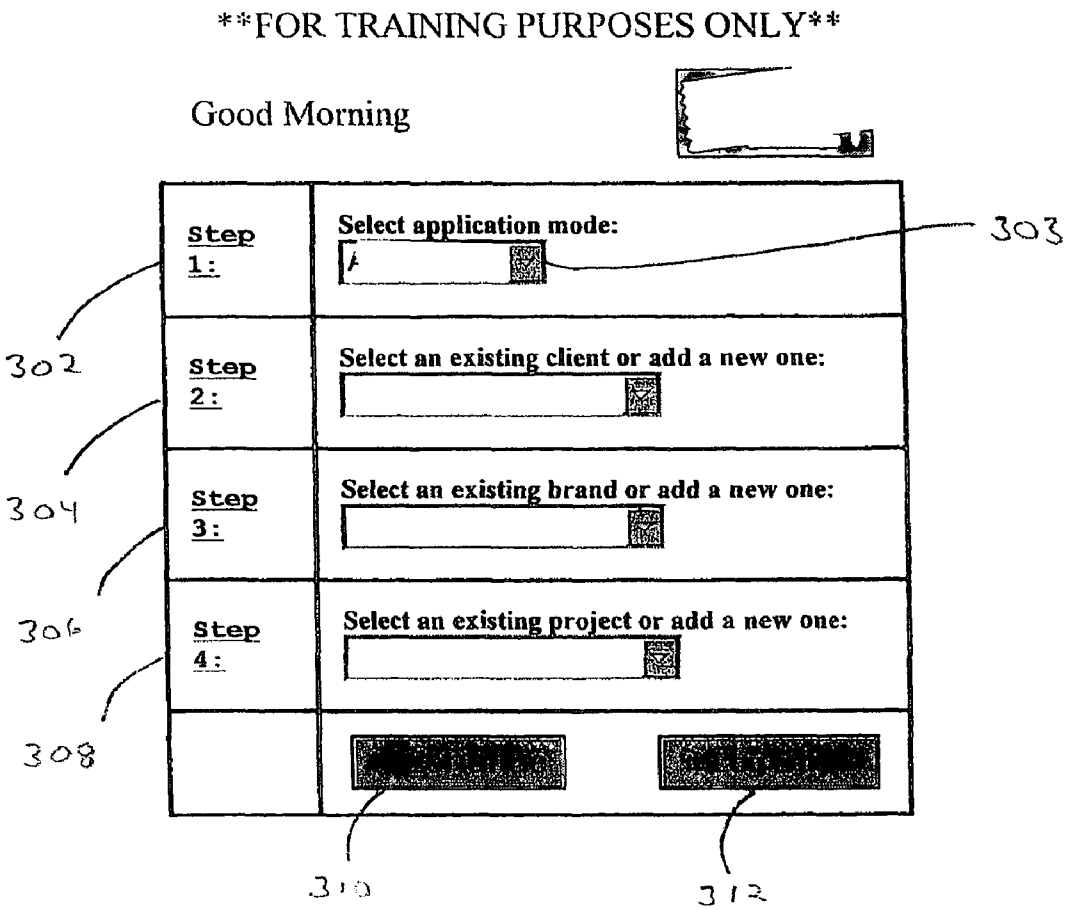

FOR TRAINING PURPOSES ONLY
Good Morning
Step 1:
Select application mode:
Step 2:
Select an existing client or add a new one:
Step 3:
Select an existing brand or add a new one:
Step 4:
Select an existing project or add a new one:
302
303
304
306
308
310
312

FIGURE 23

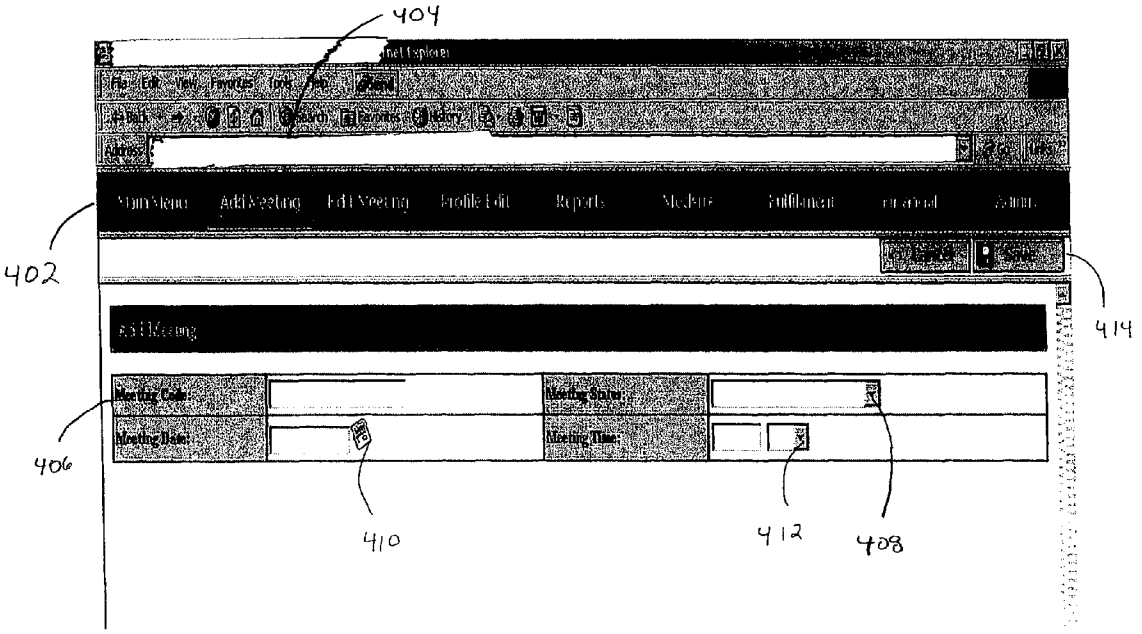


FIGURE 24

Meeting Type and Topic

The first step in adding a meeting is to choose a Meeting Type and Topic.

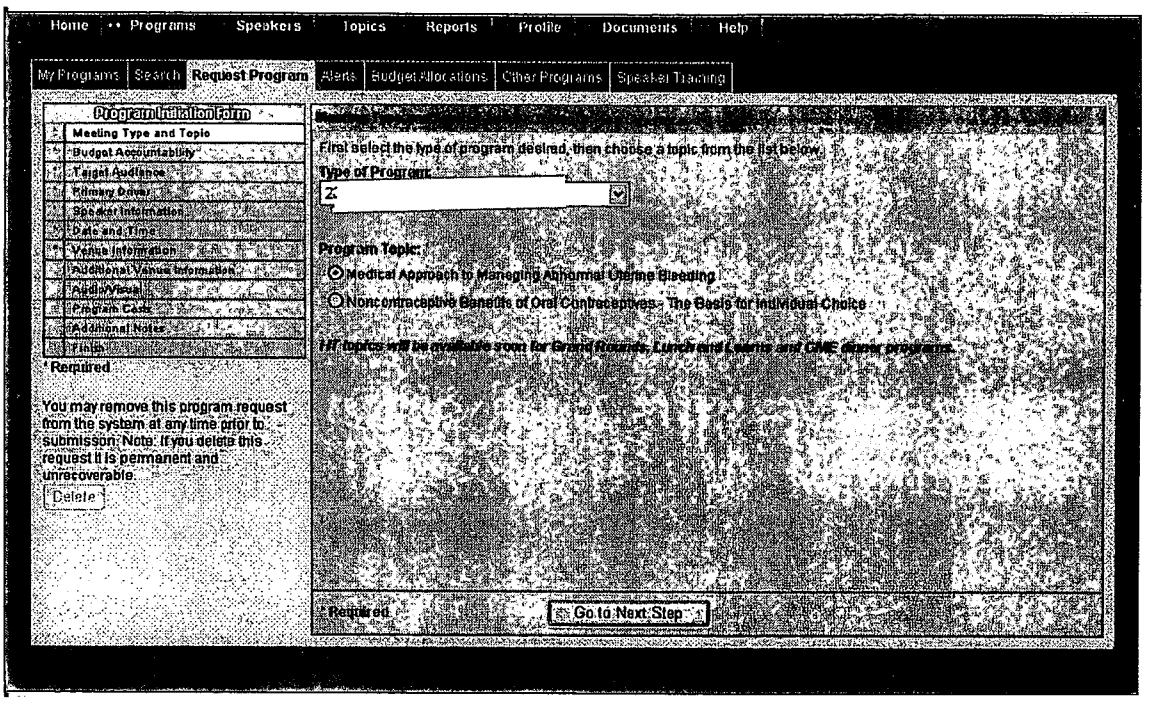


FIGURE 25

Budget Accountability

Budget accountability can be assigned to one or more reps on the Budget Accountability page.

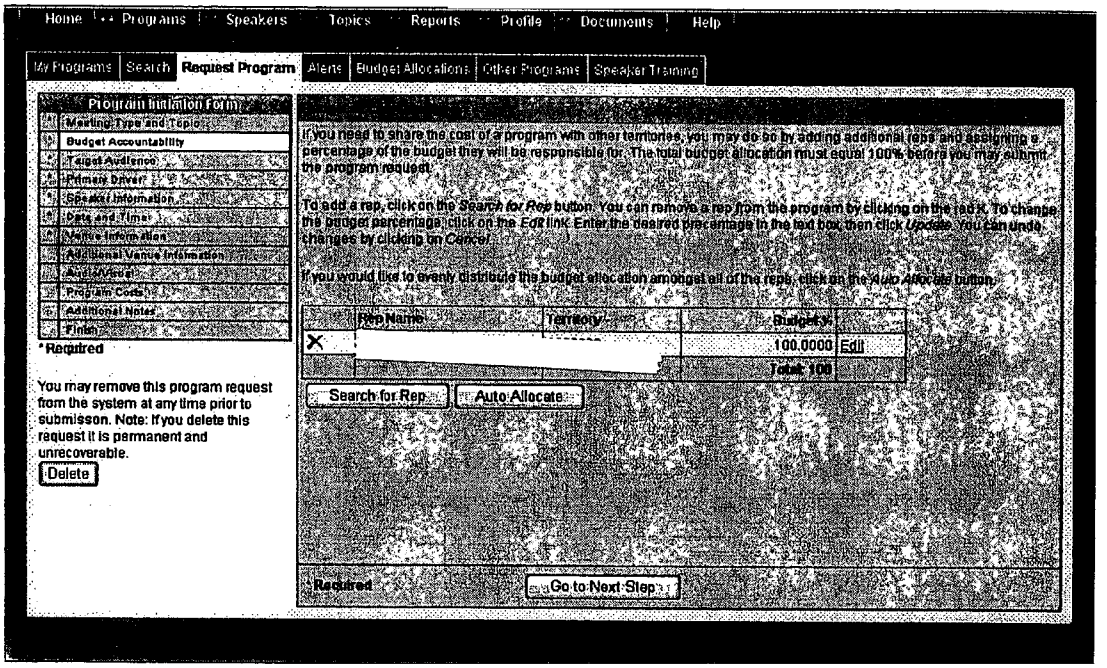


FIGURE 26

Target Audience

The following page allows users to designate the number of attendees, the target audience type, and specific targeted medical professionals.

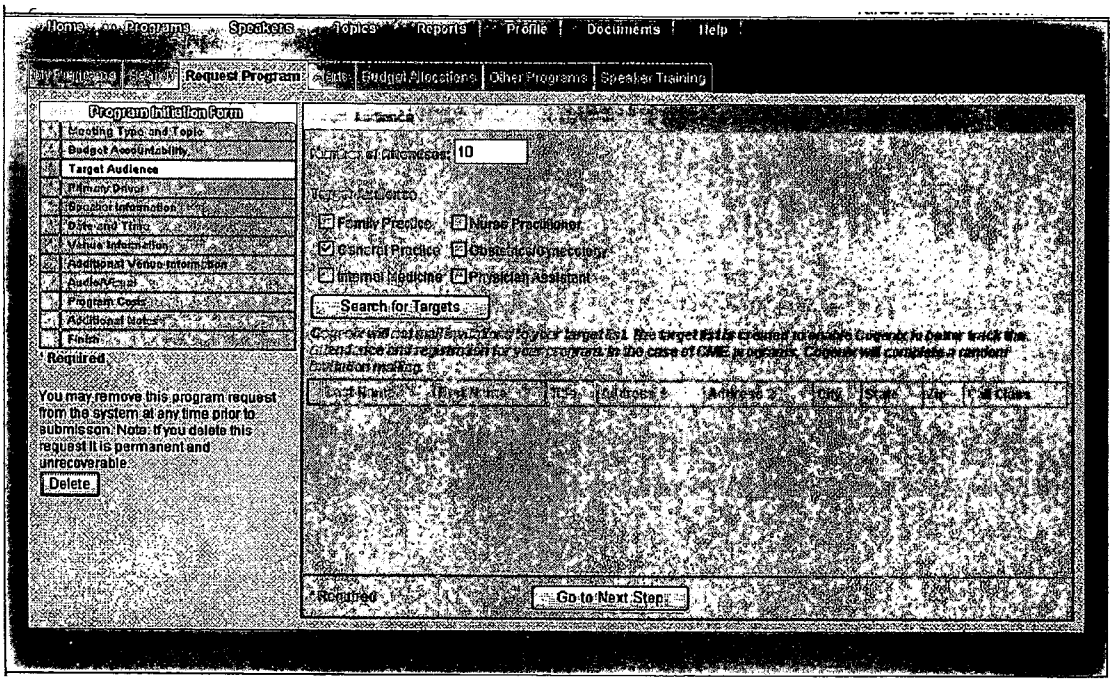


FIGURE 27

Driving Factors

The meeting must be assigned a primary driving factor. This can be a speaker, date, or location. This determines the meetings "driving factors". Secondary and Tertiary driving factors can be designated.

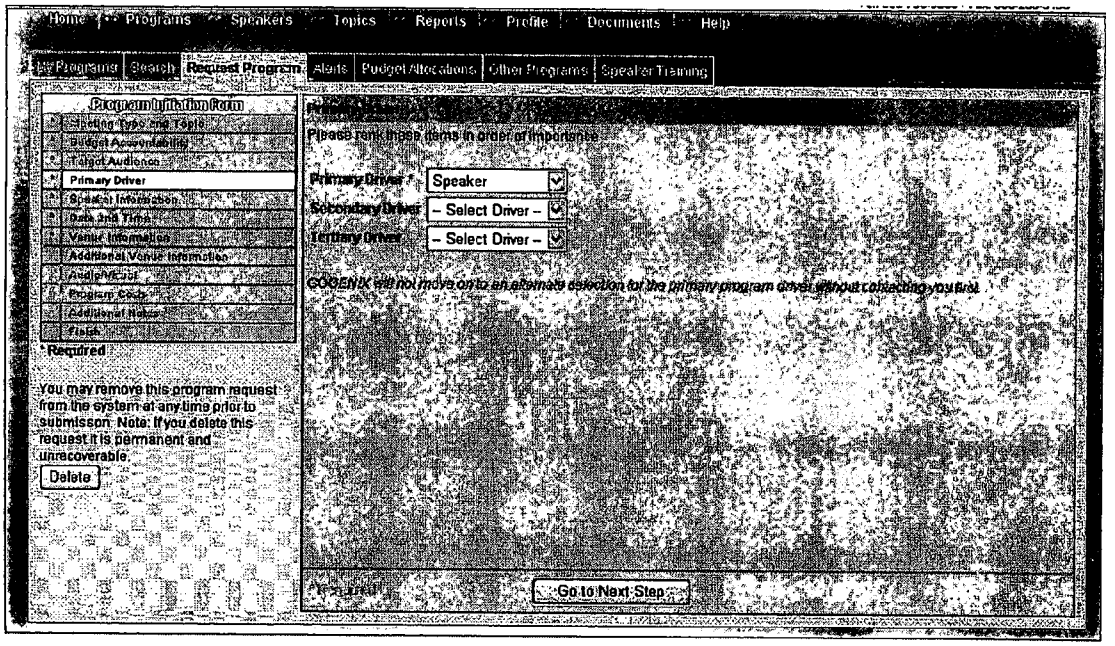


FIGURE 28

Speaker Information

This page lets the user choose the meeting speaker.

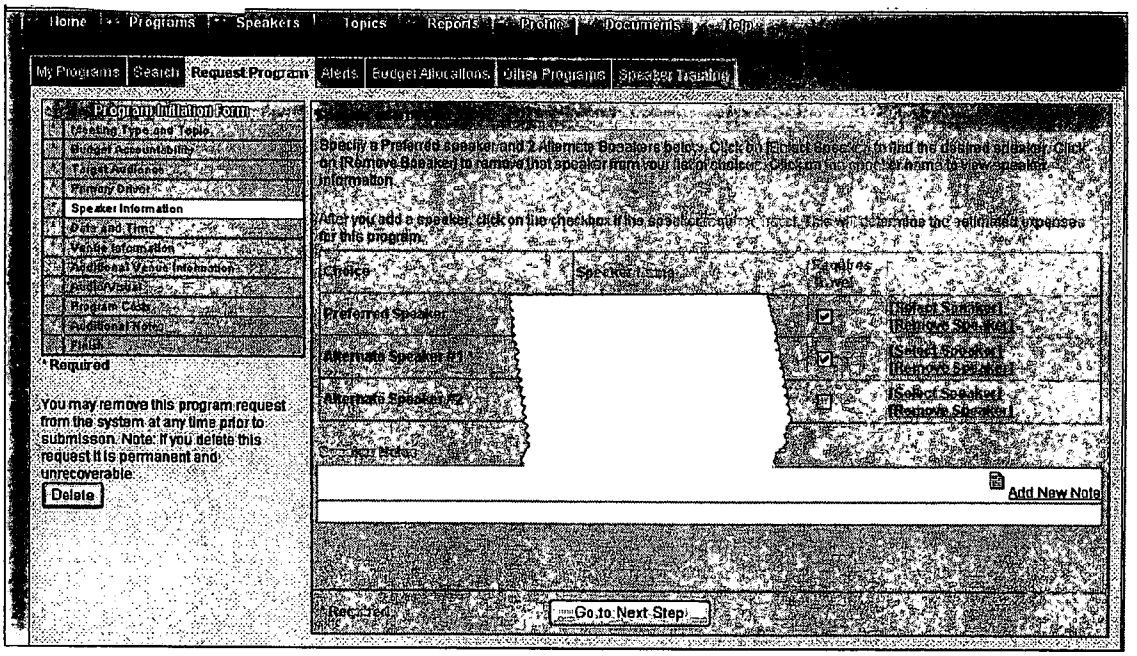


FIGURE 29

Request Program: Date and Time

The date and time are set using this page.

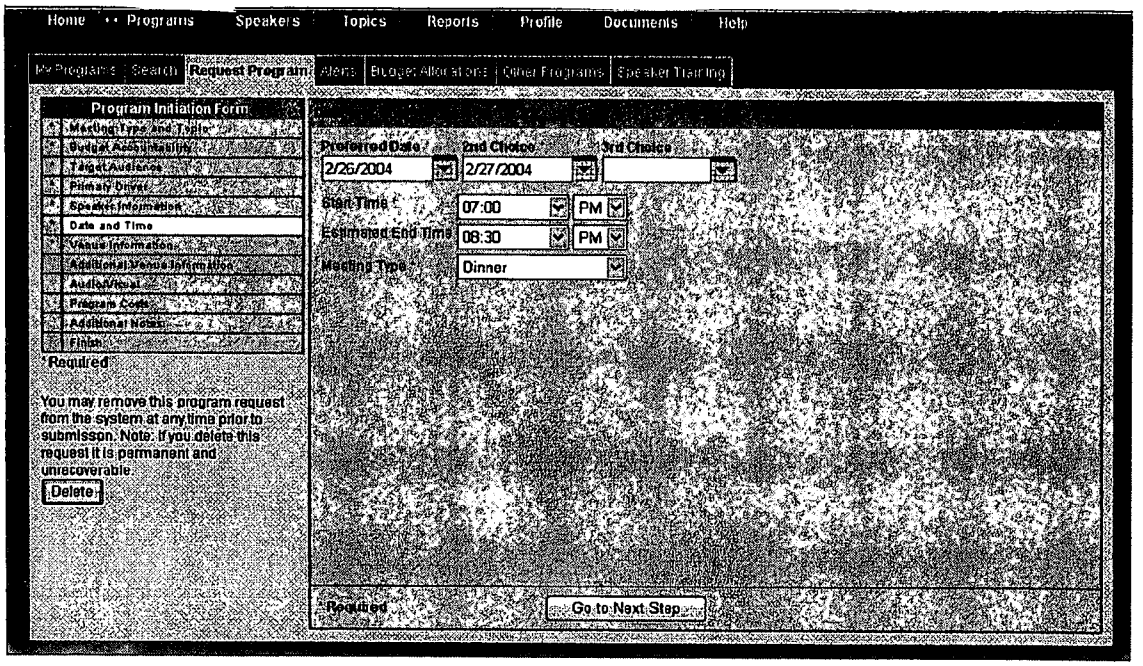


FIGURE 30

Venue

The meeting venue and contact information are recorded on this page.

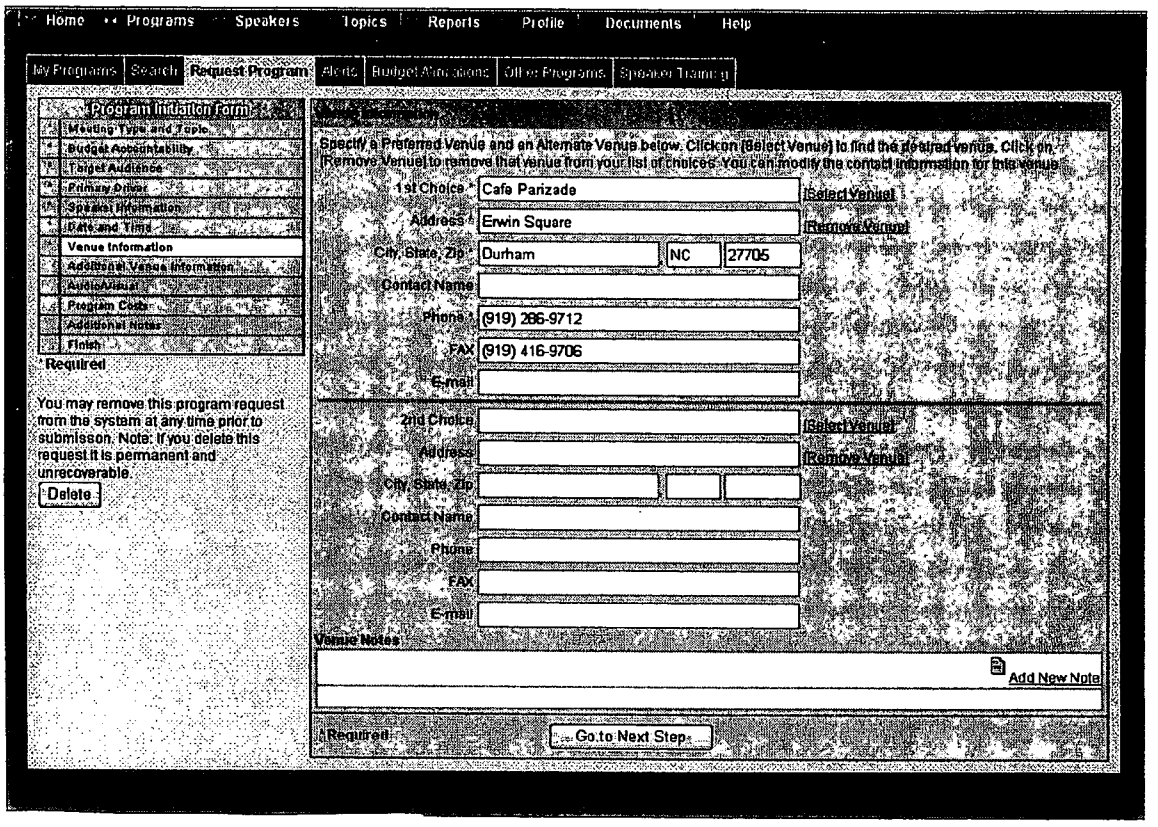


FIGURE 31

Request Program: Additional Venue

Additional venue details can be designated on this page.

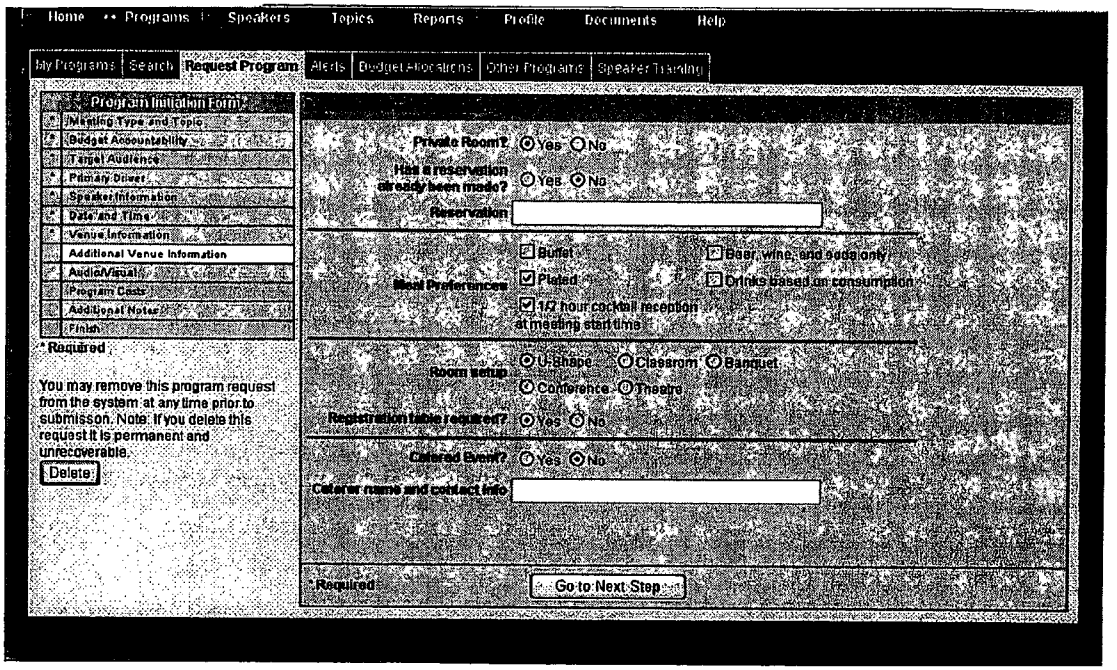


FIGURE 32

Audio/Visual Requirements

Users can record AV needs with this page.

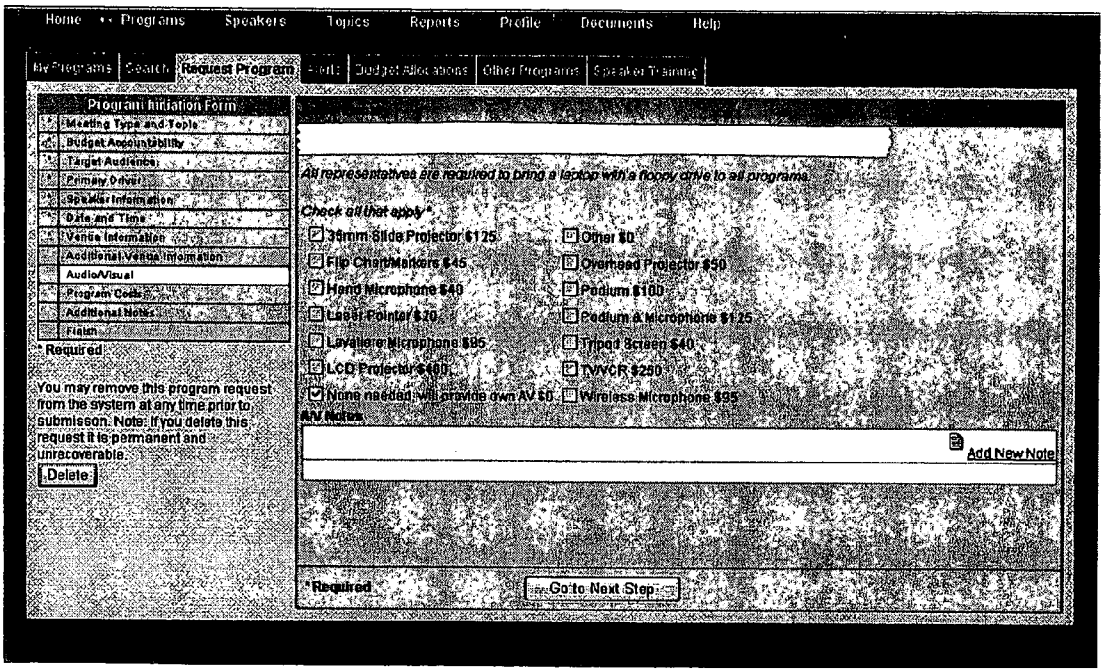


FIGURE 33

Program Costs

The application displays program costs.

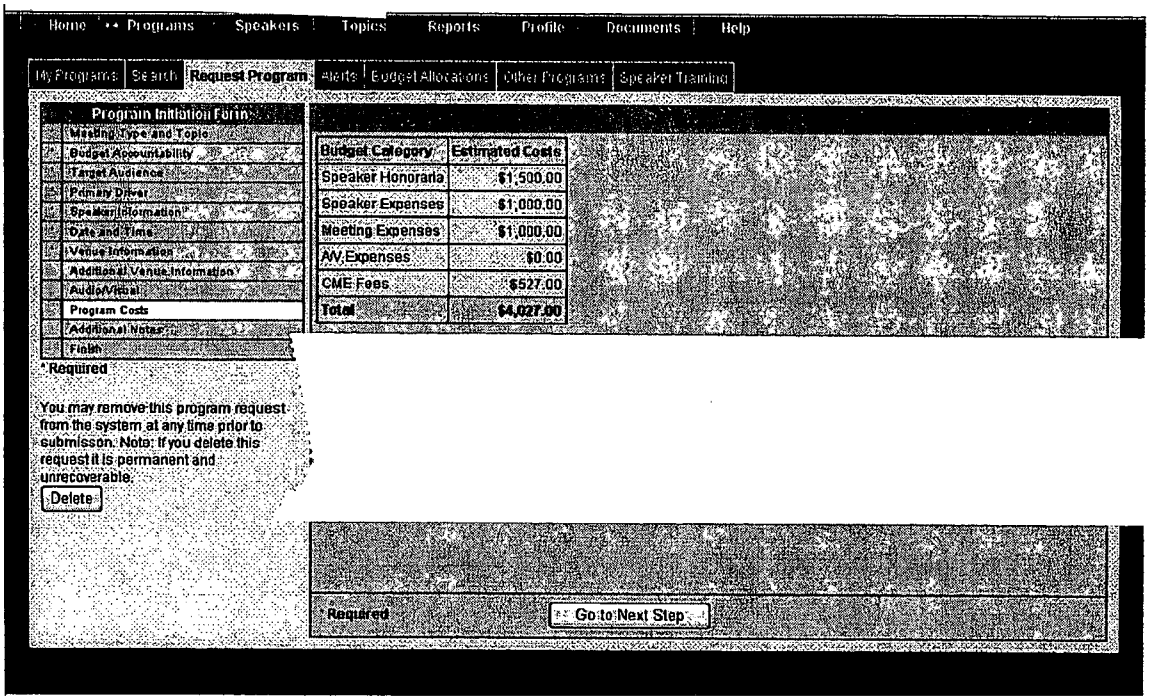


FIGURE 34

Additional Notes

Users can record general notes relating to the meeting.

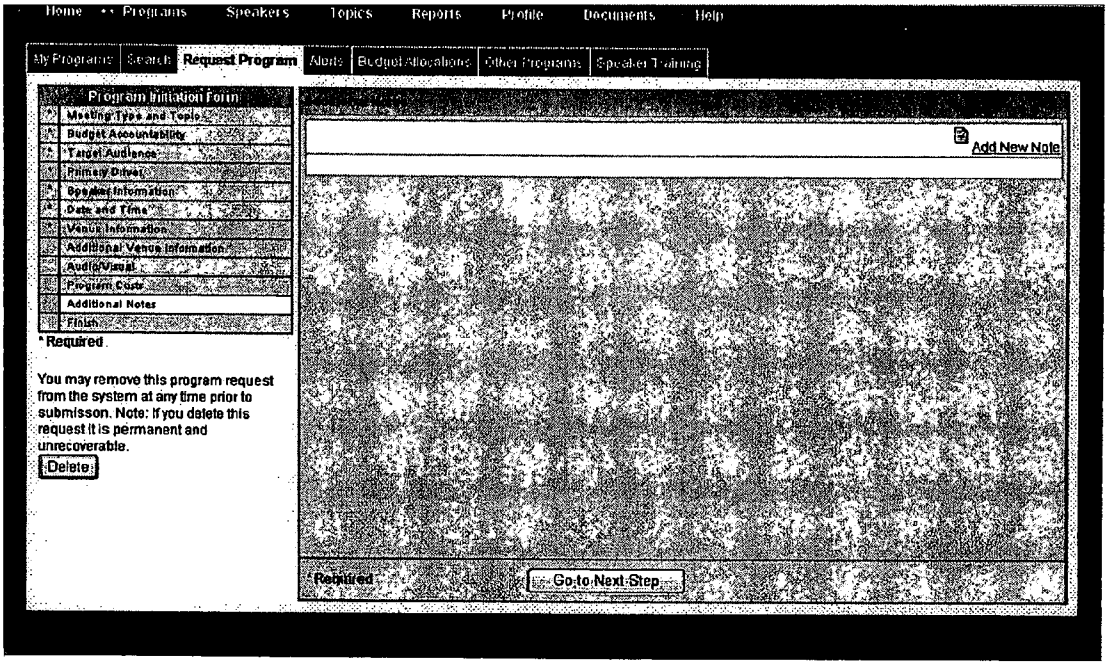


FIGURE 35

Summary/Submit

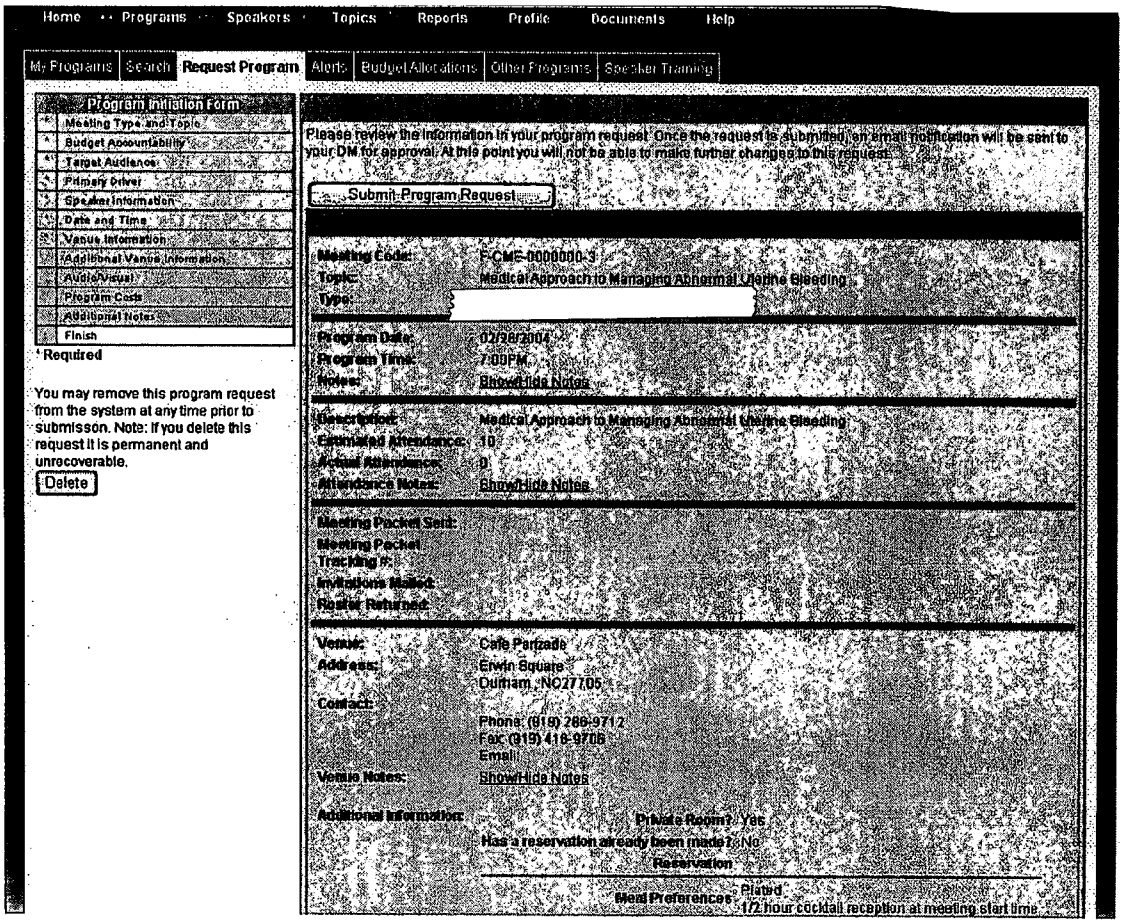


FIGURE 36

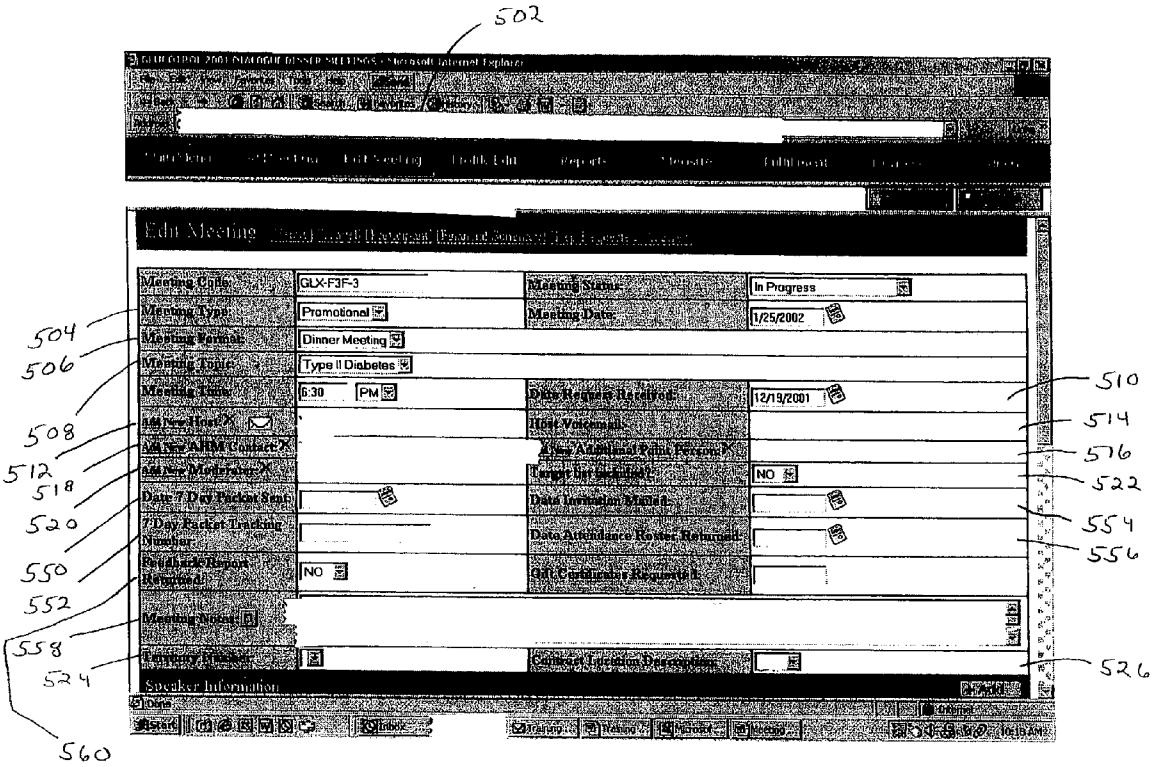

502
Edit Meeting
Meeting Code
GLX-F3F-3
Meeting Status
In Progress
Meeting Type
Promotional
Meeting Date
1/25/2002
Meeting Format
Dinner Meeting
Meeting Topic
Type II Diabetes
Meeting Time
6:30
PM
Date Request Received
12/19/2001
Date 7 Day Packet Sent
Date Attendance Roster Returned
Feedback Report Returned
NO
Speaker Information
504
506
508
512
518
520
550
552
558
524
560
510
514
516
522
554
556
526

FIGURE 37

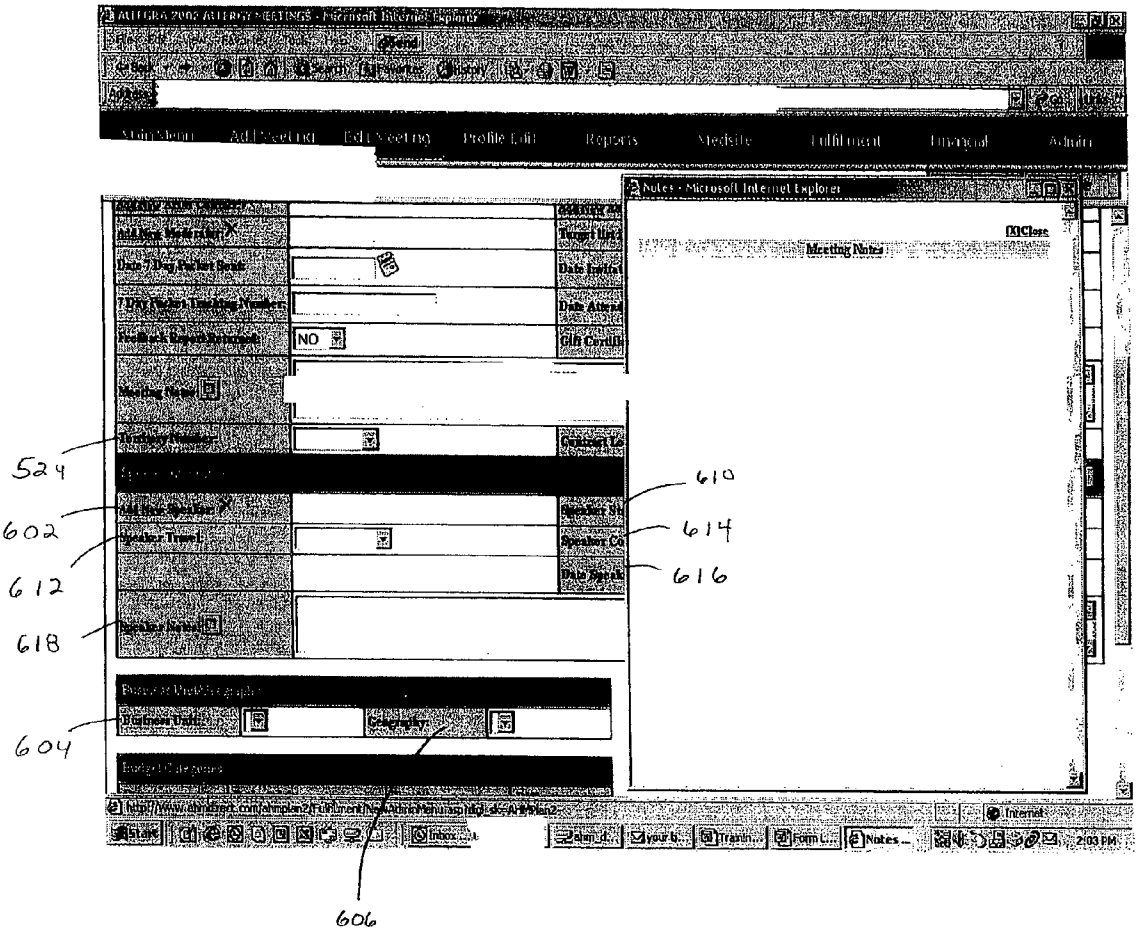


FIGURE 38

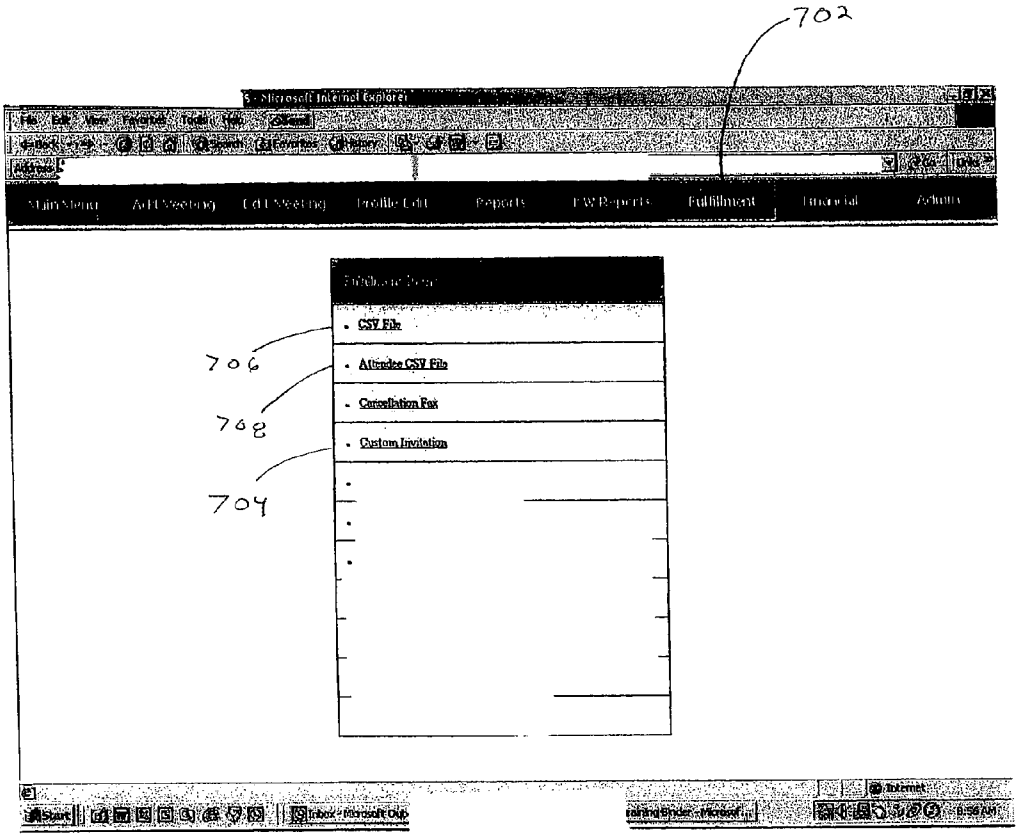

702
Fulfillment
CSV File
Attendee CSV File
Cancellation Fax
Custom Invitation
706
708
704

FIGURE 39

Home Programs Speakers Topics Reports Profile Documents Help

My Programs Request Program Alerts Program Allocations Budget Allocations Other Programs Speaker Training

Figure 40

Meeting Code	Meeting Date	Alert Date	Alert	Note
FHC-PRO-4085-2	10/30/2003	10/31/2003	Program Evaluation Required	This e-mail is to notify you that your program has been completed. To assist us in evaluating the effectiveness of this activity and to make recommendations for future educational offerings, please take a few moments to complete the program evaluation form. Your response will help ensure that future programs are informative and meet the educational needs of our customers. To ensure that the program evaluation forms are completed in a timely manner, it is required that you fill out the forms before you may request any new programs. Thank you for your cooperation. Please click on the link below to complete the Program Evaluation form. h meeting_id=&section=evaluation If you have any questions please call)0.
FHC-CME-7266-2	10/30/2003	10/31/2003	Program Evaluation Required	This e-mail is to notify you that your program has been completed. To assist us in evaluating the effectiveness of this activity and to make recommendations for future educational offerings, please take a few moments to complete the program evaluation form. Your response will help ensure that future programs are informative and meet the educational needs of our customers. To ensure that the program evaluation forms are completed in a timely manner, it is required that you fill out the forms before you may request any new programs. Thank you for your cooperation. Please click on the link below to complete the Program Evaluation form. meeting_id=&section=evaluation If you have any questions please call (9290
FHC-CME-7268-2	10/30/2003	10/31/2003	Program Evaluation Required	This e-mail is to notify you that your program has been completed. To assist us in evaluating the effectiveness of this activity and to make recommendations for future educational offerings, please take a few moments to complete the program evaluation form. Your response will help ensure that future programs are informative and meet the educational needs of our customers. To ensure that the program evaluation forms are completed in a timely manner, it is required that you fill out the forms before you may request any new programs. Thank you for your cooperation. Please click on the link below to complete the Program Evaluation form. h meeting_id=&section=evaluation If you have any questions please call
				This e-mail is to notify you that your program has been completed. To assist us in evaluating the effectiveness of this activity and to make recommendations for future educational offerings, please take a few moments to complete the program evaluation form. Your response will help ensure that future programs are informative and meet the educational needs of our customers. To ensure that the program evaluation forms are completed in a timely manner,

Home Programs Speakers Topics Reports Profile Documents Help

My Programs Request Program Alerts Program Allocations Budget Allocations Other Programs Speaker Training

Area	Yasmin CSC				Mirena			
	Allocated	In Progress	Completed	Still Available	Allocated	In Progress	Completed	Still Available
A	39	0	35	4	11	1	9	1
B	36	0	34	2	9	2	11	-4
C	34	0	31	3	9	0	9	0
D	24	0	24	0	9	0	10	-1
E	21	0	20	1	12	0	7	5
Total	154	0	144	10	50	3	46	1

Figure 41

Home Programs Sp akers Topics Reports Profile Documents Help

My Programs Request Program Alerts Program Allocations **Budget Allocations** Other Programs Speaker Training

This tab will allow Region and District Mangers to allocate funds to their Territories. F r Reps, it will show the hist ry of funds transfer.

Region/District/Territory	Description	Rep	Unallocated	+	Unallocated Districts	+	Allocated	=	Sub Total	Transfer	History
ALL	Total 2003 Budget		$0	+		+		=	$0		History
A	FHC East Reg - A	[\	$0	+	$359,256	+	-$6,101	=	$353,155		History
B	FHC South Reg - B	[\	$0	+	$331,177	+	$6,110	=	$337,287		History
C	FHC Central Reg - C		$0	+	$253,590	+	$6,419	=	$260,009		History
D	FHC West Reg - D		$0	+	$227,364	+	$24,595	=	$251,959		History
E	FHC Region	on	$0	+	$280,655	+	$31,211	=	$311,866		History
M	FHC Marketing		$178,381	+	$0	+	$0	=	$178,381	Transfer	History
		Total	$178,381	+	$1,452,042	+	$62,234	=	$1,692,657		

Figure 42

Home | Programs | Speakers | Topics | Reports | Profil | Documents | Help

My Programs Request Program Alerts Program Allocations Budget Allocations Other Programs Speaker Training

NPWH 6th Annual Conference
Women's Healthcare
From Adolescence through Menopause
October 15, 2003
Savannah, Georgia
Download Brochure (523 KB)

Savannah	October 15th	Registration List as of 9/29/03

Attendance Data and Program Evaluation Summary

Advances in Contraception: Choices to Improve Quality of Life For Statistical Analysis Only! Not to be used for promotional or follow up purposes by sales or marketing.				
Minneapolis	June 11th	Attendance Data	Program Evaluation Summary	CME Evaluation Summary
Boston	June 12th	Attendance Data	Program Evaluation Summary	CME Evaluation Summary
Atlanta	June 19th	Attendance Data	Program Evaluation Summary	CME Evaluation Summary
Dallas	September 10th	Attendance Data		
Santa Monica	September 16th	Attendance Data		
Metabolic Markers: Understanding your Patient's Risk for CHD For Statistical Analysis Only! Not to be used for promotional or follow up purposes by sales or marketing.				
Paradise Valley (Phoenix)	June 19th	Attendance Data	Program Evaluation Summary	

Figure 43

Home Programs Sp akers Topics Reports Profile Documents Help

My Programs Request Program Alerts Program Allocations Budget Allocations Other Programs Speaker Training

Speaker Training Attendance Data

City	Training Dates	Attendance Data	Date Posted	Upload
San Francisco	January 9th-11th	Attendance Data	10/31/2003	Browse...
H uston	January 16th-18th	Attendance Data	10/31/2003	Browse...
Chicago	January 23rd-25th	Attendance Data	10/31/2003	Browse...
Boston	January 30th-February 1st	Attendance Data	10/31/2003	Browse...
Miami	February 6th-8th	Attendance Data	10/31/2003	Browse...

Upload

Figure 44

Home Programs Speakers Topics Reports Profil Documents Help

Search Nominate Speaker

Select your search criteria b low

Last Name

First Name

City

State

-- State --

Search for speakers in my region

Specialty

- OB/GYNs
- Nurse Practitioners
- Physician Assistant
- PharmD
- Other

Topic Type

- Contraception
- IUS
- HT

Search New Search

Figure 45

Home Programs Speakers Topics Reports Profile Documents Help

Promotional CSC CME

Promotional Topics - Approved

IUS: ge

Download document

Needs Assessment:
Despite a variety of available contraceptive methods in the U.S., an alarmingly high rate of unintended pregnancy persists. One of these methods, the intrauterine device, has been proven to be an extremely effective tool. Its use, however, has been hampered in the past by several myths and misperceptions that linger in the minds of patients and physicians alike. With the advent of a newer levonorgestrel-releasing intrauterine system (LNG-IUS), there is a strong need for educational activities that will reinforce its proper use and lead to better outcomes in fertility control.

Learning Objectives:

- Review the overall intended pregnancy rate in the U.S. and worldwide pregnancy rates associated with specific birth control methods and sterilization
- Discuss usage patterns for various contraceptive methods
- Compare the mechanism of action of intrauterine versus oral contraception
- List the potential benefits and risks of using an intrauterine system (IUS)
- Describe the pharmacologic characteristics of a levonorgestrel-containing intrauterine contraceptive) with respect to plasma concentrations and changes in the endometrium
- Discuss the significance of various changes in bleeding patterns with
- Outline discussion points needed for patient counseling methods
- Use the components of the nseling Kit appropriately
- Explain when and how to insert
- Recognize signs of, and subsequently manage, IUS complications
- Understand the critical steps involved in the ursement process (coverage, coding, and payment)

Figure 46

FOR TRAINING PURPOSES ONLY

Good Morning

802	Step 1:	Select application mode:
804	Step 2:	Select an existing client or add a new one:
806	Step 3:	Select an existing brand or add a new one:
808	Step 4:	Select an existing project or add a new one: 2001 Dialogue Dinner Meetings

FIGURE 47

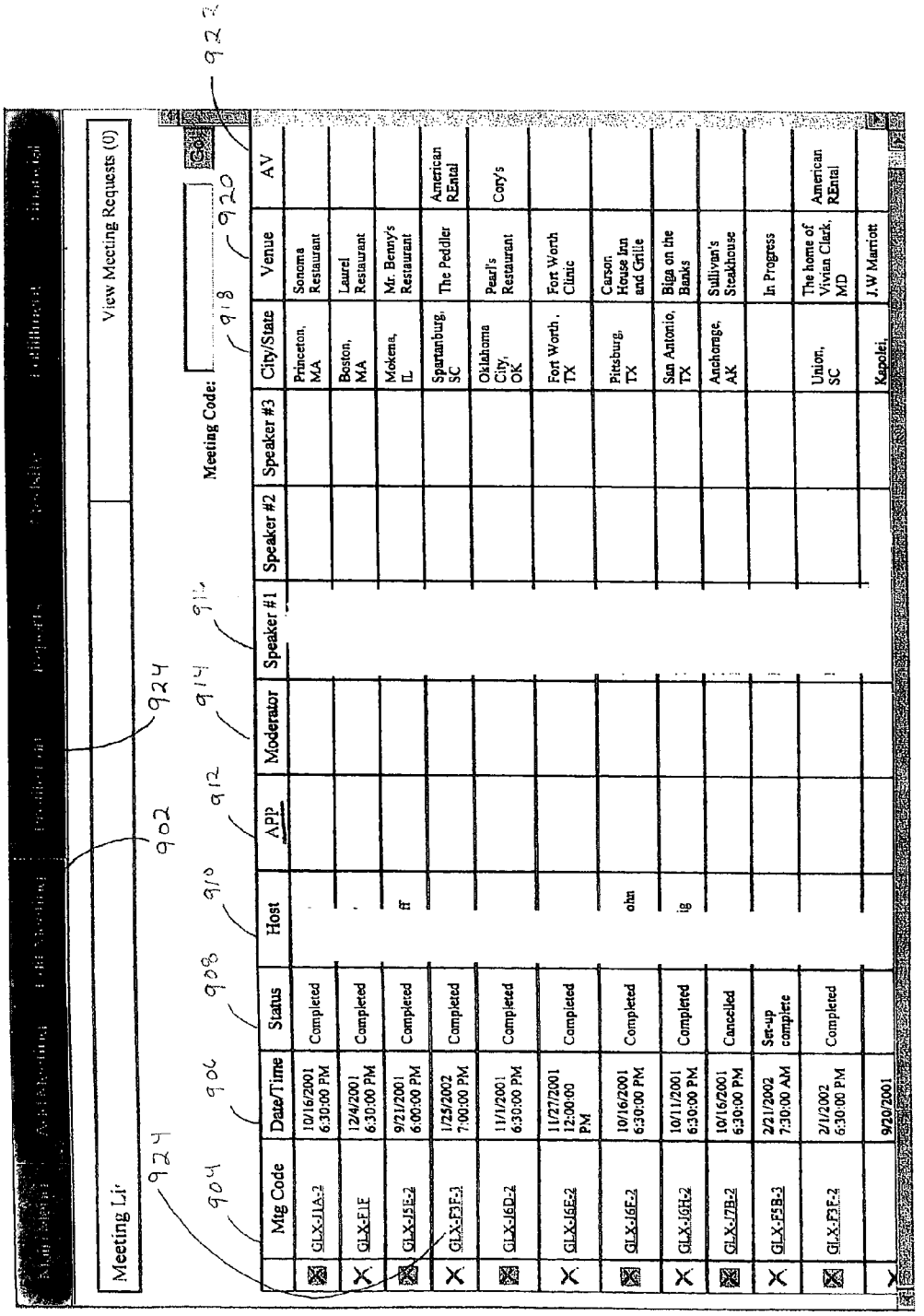

Meeting Li
View Meeting Requests (U)
Meeting Code:
Mtg Code
Date/Time
Status
Host
APP
Moderator
Speaker #1
Speaker #2
Speaker #3
City/State
Venue
AV
GLX-J1A-2 10/16/2001 6:30:00 PM Completed Princeton, MA Sonoma Restaurant
GLX-F1E 12/4/2001 6:30:00 PM Completed Boston, MA Laurel Restaurant
GLX-J5E-2 9/21/2001 6:00:00 PM Completed Mokena, IL Mr. Benny's Restaurant
GLX-F3F-1 1/25/2002 7:00:00 PM Completed Spartanburg, SC The Peddler American REntal
GLX-J6D-2 11/1/2001 6:30:00 PM Completed Oklahoma City, OK Pearl's Restaurant Cory's
GLX-J6E-2 11/27/2001 12:00:00 PM Completed Fort Worth, TX Fort Worth Clinic
GLX-J6F-2 10/16/2001 6:30:00 PM Completed Pittsburg, TX Carson House Inn and Grille
GLX-J6H-2 10/11/2001 6:30:00 PM Completed San Antonio, TX Biga on the Banks
GLX-J7B-2 10/16/2001 6:30:00 PM Canceled Anchorage, AK Sullivan's Steakhouse
GLX-F5B-3 2/21/2002 7:30:00 AM Set-up complete In Progress
GLX-F3E-2 2/1/2002 6:30:00 PM Completed Union, SC The home of Vivian Clark, MD American REntal
9/20/2001 Kapolei, J.W Marriott
902
904
906
908
910
912
914
916
918
920
922
924

FIGURE 48

Request List

Qualified ... personnel use this request list to access meeting requests awaiting approval.

Home • • Programs Speakers Topics Reports Profile Documents Help

My Programs | Search | Request Program | Alerts | Budget Allocations | Other Programs | Speaker Training

Request Submitted for Approval

Export to Excel

Meeting Code	Territory	Rep	Speaker	Topic	Type	Status	Meeting Date	Requested
F-CME-0000000-3		Sp	Ju Ti	Medical Approach to Managing Abnormal Uterine Bleeding		Request Submitted for Approval	02/26/2004	11/24/2003 11:08:04 AM
F-GR-B014035	B014035	Oa	C M	Topic B		Request Submitted for Approval	02/25/2004	11/19/2003 4:05:01 PM
F-GR-B014035-2	B014035	Oa	C M	IUS		Request Submitted for Approval	02/26/2004	11/19/2003 4:18:07 PM
F-LNL-B014035	B014035	Ga	C M	Abnormal Menstrual Bleeding: Diagnosis and Treatment		Request Submitted for Approval	02/25/2004	11/19/2003 4:36:46 PM
F-CME-A077108	A077108	Ce	A L	Noncontraceptive Benefits of Oral Contraceptives - The Basis for Individual Choice		Request Submitted for Approval	02/18/2004	11/14/2003 2:18:18 PM
F-LNL-D044170	D044170	La Tv	A	Abnormal Menstrual Bleeding: Diagnosis and Treatment		Request Submitted for Approval	02/05/2004	11/16/2003 11:28:15 PM
F-LNL-D044170-2	D044170	La Tv	A	Abnormal Menstrual Bleeding: Diagnosis and Treatment		Request Submitted for Approval	03/05/2004	11/16/2003 11:55:08 PM
F-CME-D044170-5	D044170	La Tv	C F	Medical Approach to Managing Abnormal Uterine Bleeding		Request Submitted for Approval	04/12/2004	11/2/2003 10:52:33 PM
F-CME-A077104	A077104	Ki	rey J S	Noncontraceptive Benefits of Oral Contraceptives - The Basis for Individual Choice		Request Submitted for Approval	03/30/2004	11/14/2003 2:37:59 PM
F-CME-B027174	B027174	W	tta S	Noncontraceptive Benefits of Oral Contraceptives - The Basis for Individual Choice		Request Submitted for Approval	03/09/2004	11/18/2003 10:59:50 PM

1

You can click on any column header to sort by that column

FIGURE 49

Program Details

Qualified [illegible] rsonnel use this page to view the details of a requested meeting. If the meeting is OK, the approver will click **Approve Request**.

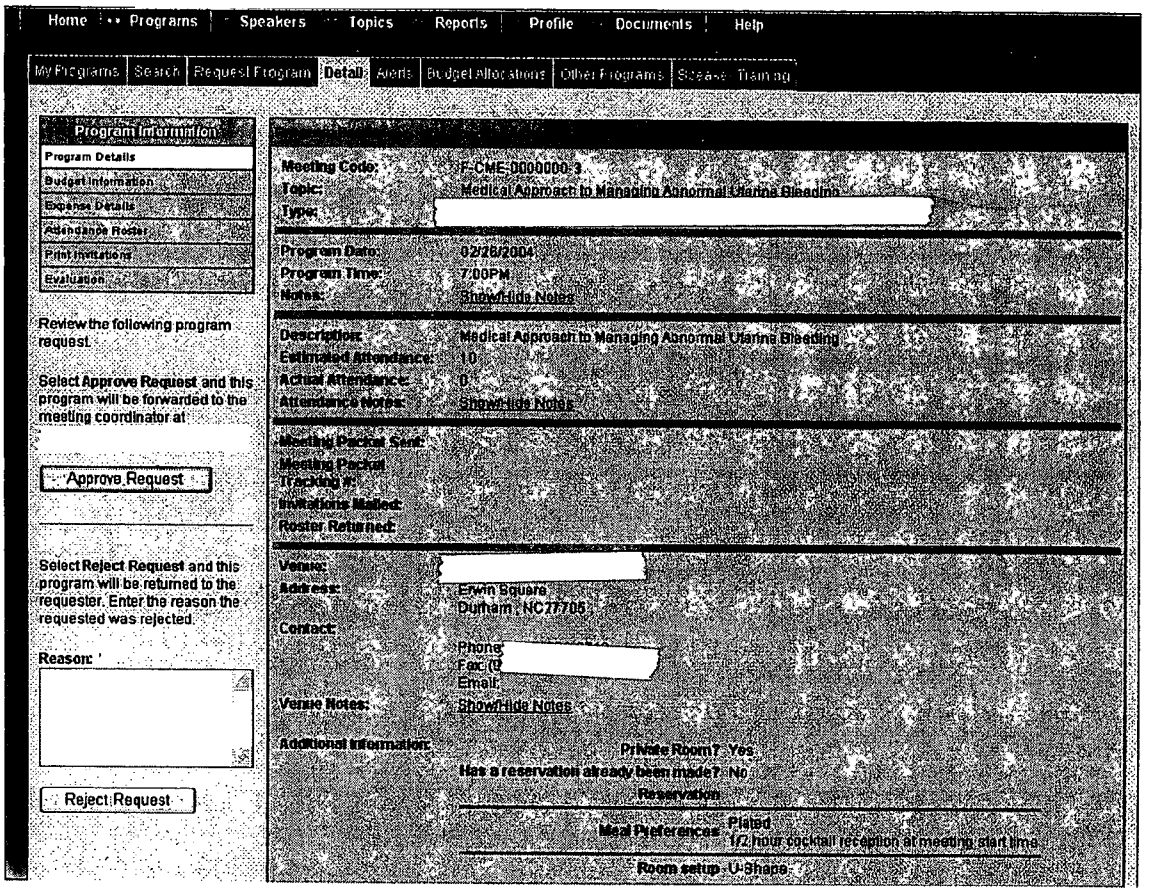


FIGURE 5D

Edit Meeting: [Venue] [Travel] [Participant] [Financial Summary] [Rep Requested Changes]

Meeting Code:	GLX-F3F-3 (1002)	Meeting Status:	Completed (1004)
Meeting Type:	Promotional (1006)	Meeting Date:	1/25/2002 (1008)
Meeting Format:	Dinner Meeting (1010)		
Meeting Topic:	Type II Diabetes (1012)		
Meeting Time:	7:00 PM (1014)	Date Request Received:	12/19/2001 (1016)
Add New Host:	(1018)	Host Voicemail:	(1020)
Add New AHM Contact:	(1022)	Add New Additional Point Person:	(1024)
Add New Moderator:	(1026)	Target list included?:	NO (1028)
Date 7 Day Packet Sent:	1/18/2002 (1030)	Date Invitation Mailed:	(1032)
7 Day Packet Tracking Number:	(1034)	Date Attendance Roster Returned:	1/29/2002 (1036)
Feedback Report Returned:	NO (1038)	Gift Certificates Requested:	(1040)
Meeting Notes:	1.7 alled, asked for a few days to get venue info together. I explained the lack of time we have for the 1.25 mtg and that we need that venue info asap. She said she will call on Wednesday. KN (1042)		
Territory Number:	(1044)	Contract Location Description:	(1046)

(1048)

Speaker Information

Add New Speaker:	(1050)	Speaker Status:	Confirmed (1052)
Speaker Travel:	By (1054)	Speaker Confirmed:	via Phone (1056)
		Date Speaker Confirmed	1/7/2002 (1058)

FIGURE 51A

Speaker Notes:	1/10 Spoke with Dr. [illegible] regarding travel. AHM will handle round trip for this meeting MR 1.7 Spoke with Dr. [illegible] confirmed for mtg. AHM will handle all travel. Honoraria $2,000. KN 12-19 Speakers listed not on national list nor are they local to program location. MG

1060

Business Unit/Geography:			
Business Unit:		Geography:	

1062

Budget Categories:			
Description:	Projected Amount:	Total Amount:	Difference:

1064

Edit Venue Details: [Back to Top] [Travel] [Participant] [Financial Summary] [Rep Requested Changes]

1066

Venue Name:	The Peddler 1068	Venue Address:	464 E. Main Street Spartanburg, SC 1070
Phone Number:	(864) 583-5874 1072	Fax Number:	1074
Venue Contact Name:	1076	Meeting Room:	1078
Contract Status:	Contracted 1080	Room accessible by:	5:30:00 PM 1081
Reservation Made:	1/11/2002 1082	Venue Capacity:	1084
CC Authorization Sent Date:	1/11/2002 1086	Cost Per Person:	1088
Date Contract Sent:	1/11/2002 1090	Venue Cost:	1092
Date Contract Returned:	1094	Payment Method:	Visa 1096
Av Supplier Type:	Venue 1098	Add New AV Supplier:	American REntal 1001
AV Contact Name:	1003	AV Supplier City & State:	Spartanburg, SC 1005
AV Supplier Phone Number:	(864) 583-6393 1007	AV Supplier Fax Number:	1009
Venue Notes:	1/14 [illegible] ill pick up a/v from rental place. MR 1/11 Spoke with rep and she wants a la carte and she will pick up the bill if over MR		

1011

FIGURE 51B

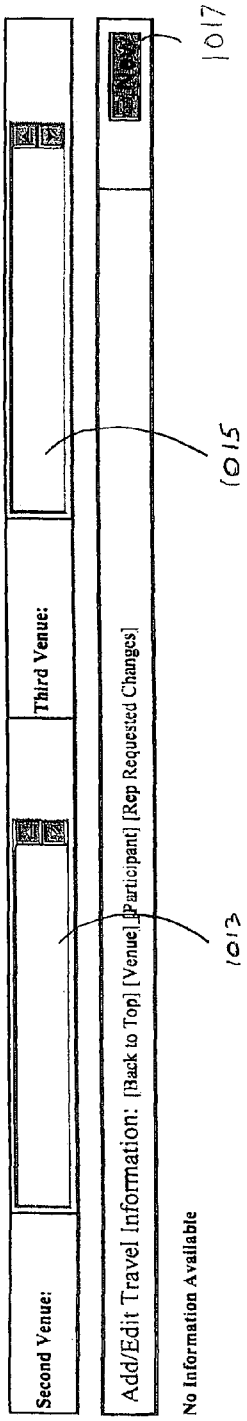

Second Venue:
Third Venue:
Add/Edit Travel Information: [Back to Top] [Venue] [Participant] [Rep Requested Changes]
No Information Available
1013
1015
1017

Figure 51a

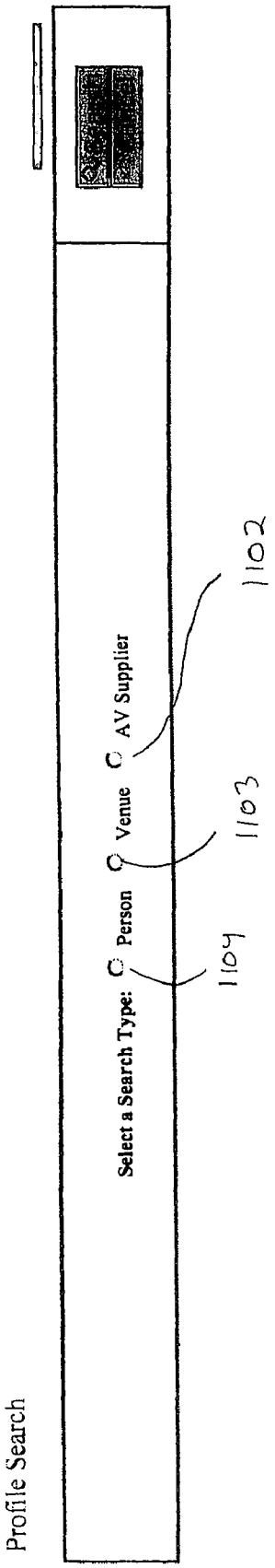

Profile Search
Select a Search Type:
Person
Venue
AV Supplier
1104
1103
1102

FIGURE 52

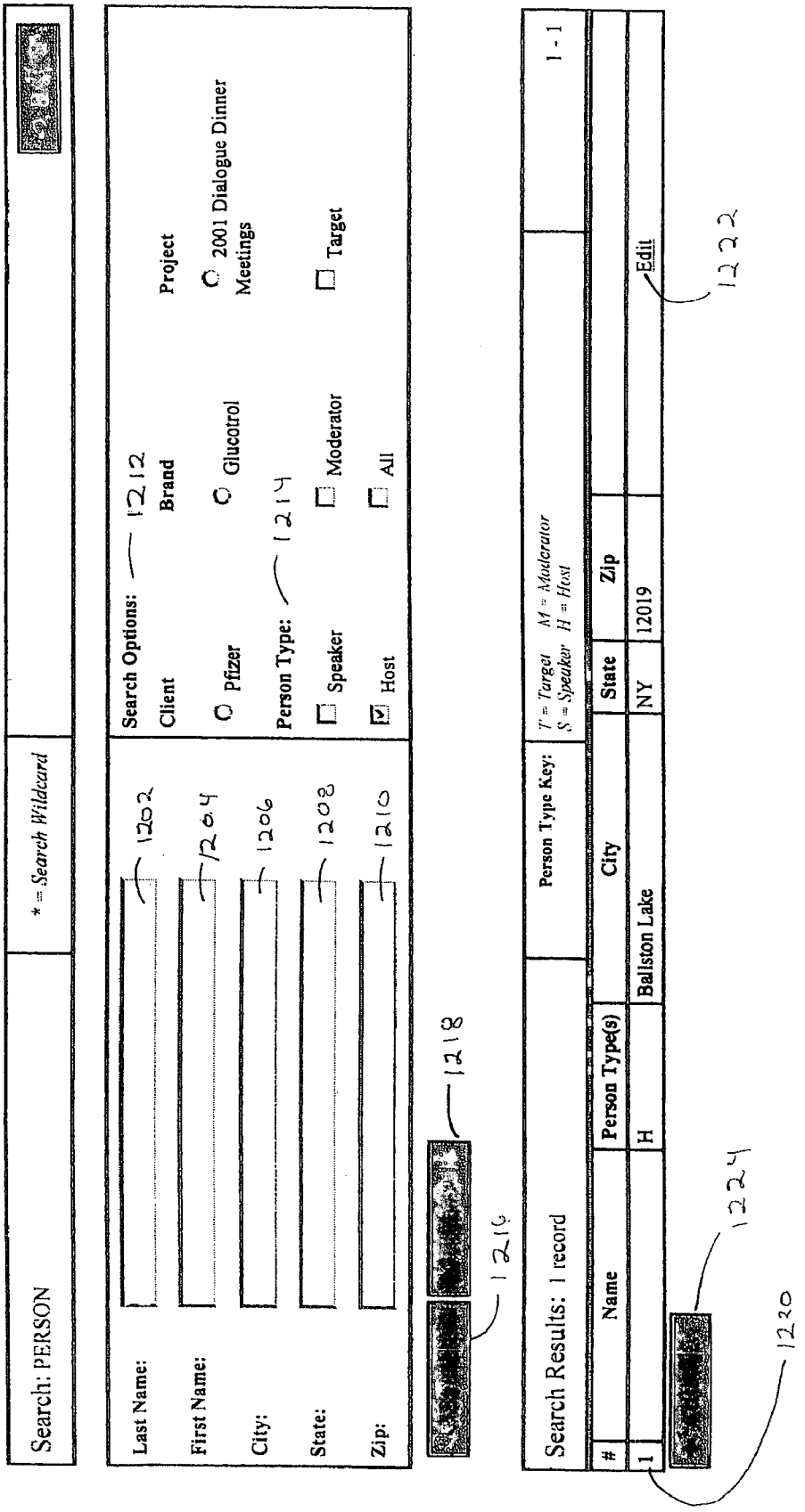

Search: PERSON
* = Search Wildcard
Last Name:
First Name:
City:
State:
Zip:
1202
1204
1206
1208
1210
Search Options:
1212
Client
Brand
Project
Pfizer
Glucotrol
2001 Dialogue Dinner Meetings
Person Type:
1214
Speaker
Moderator
Target
Host
All
1216
1218
Search Results: 1 record
Person Type Key:
T = Target M = Moderator
S = Speaker H = Host
1 - 1
#
Name
Person Type(s)
City
State
Zip
1
H
Ballston Lake
NY
12019
Edit
1220
1222
1224

FIGURE 53

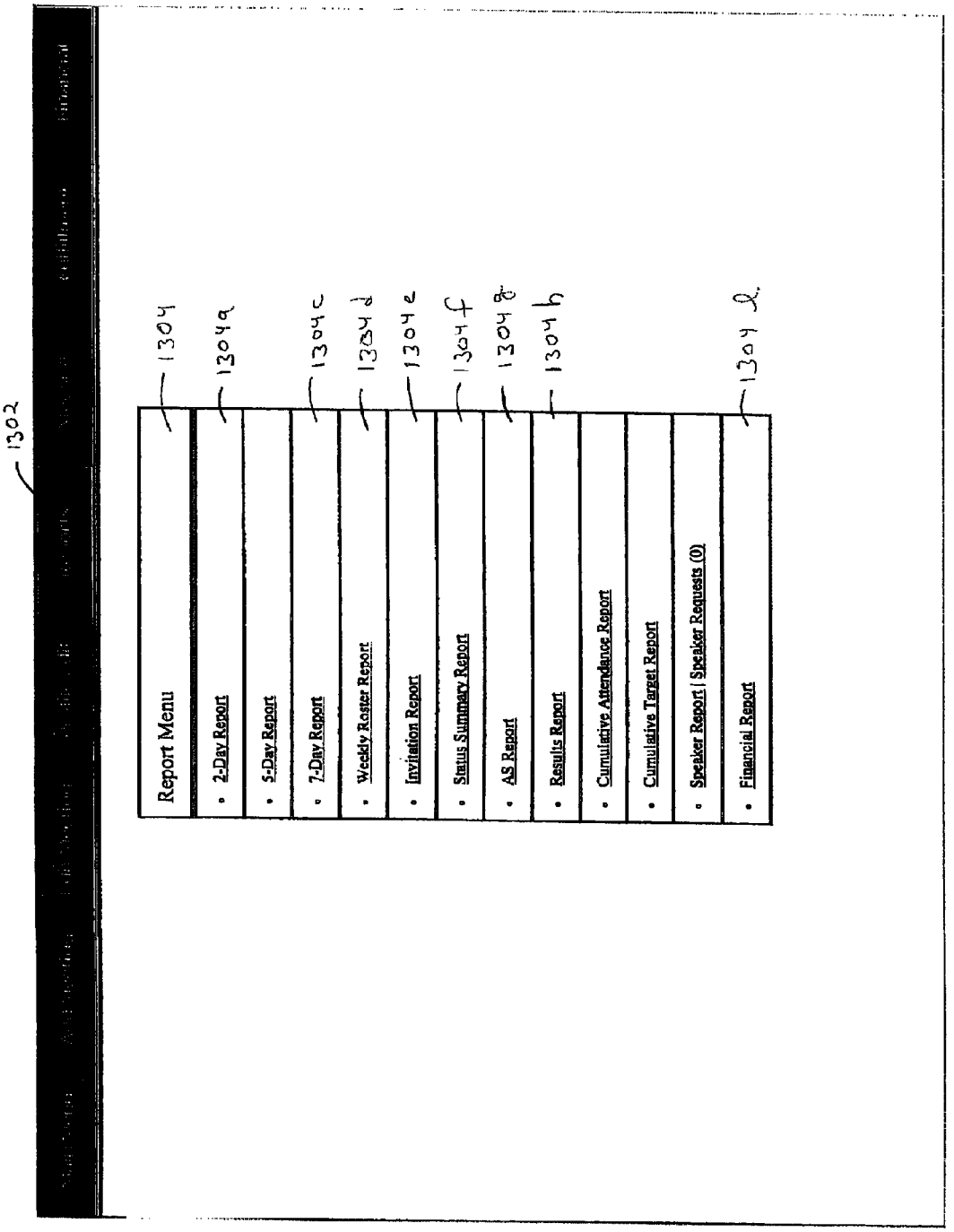

1302
Report Menu
1304
2-Day Report
1304a
5-Day Report
7-Day Report
1304c
Weekly Roster Report
1304d
Invitation Report
1304e
Status Summary Report
1304f
AS Report
1304g
Results Report
1304h
Cumulative Attendance Report
Cumulative Target Report
Speaker Report | Speaker Requests (0)
Financial Report
1304 i

Figure 54

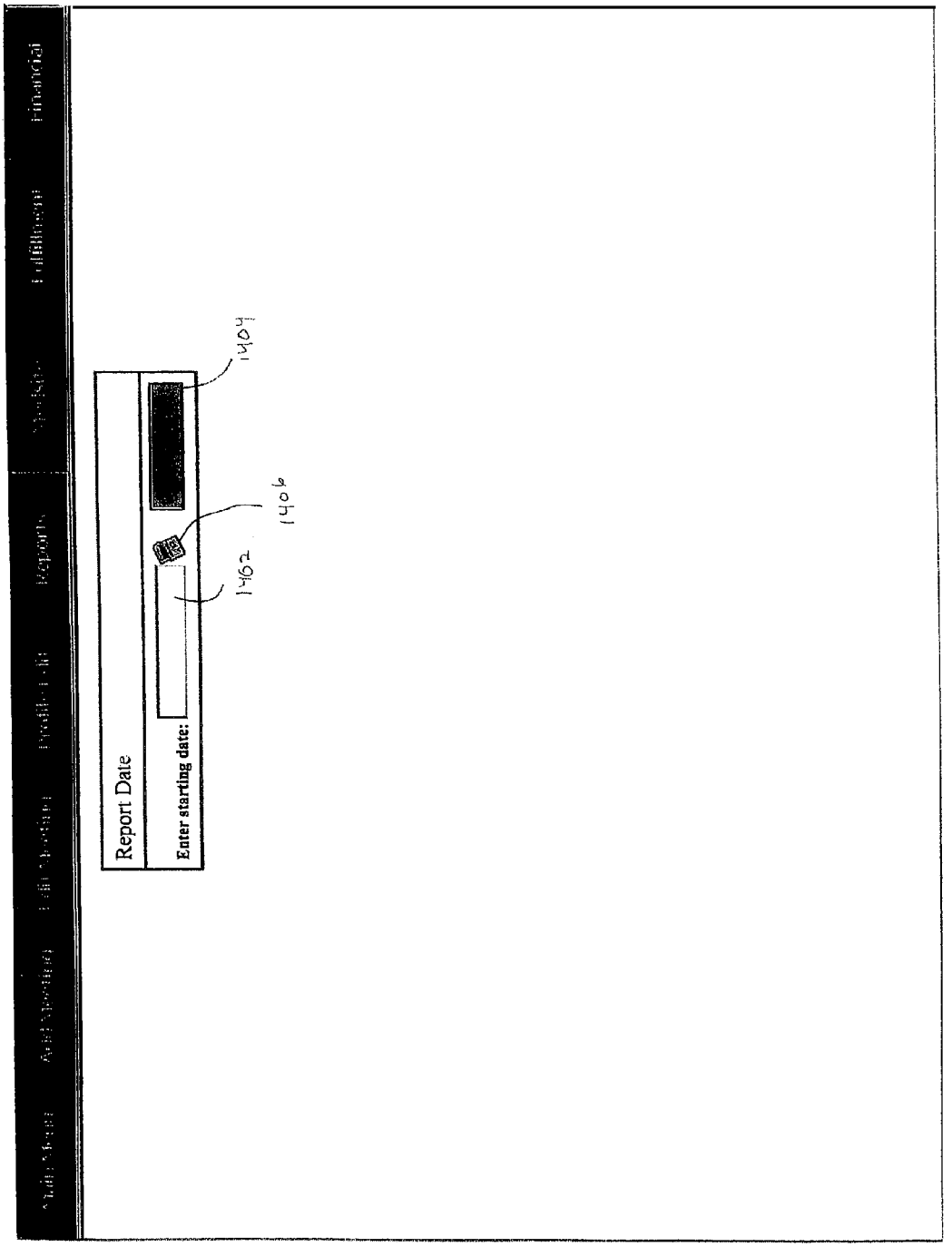


FIGURE 55

February 2002

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28		

1562

FIGURE 56

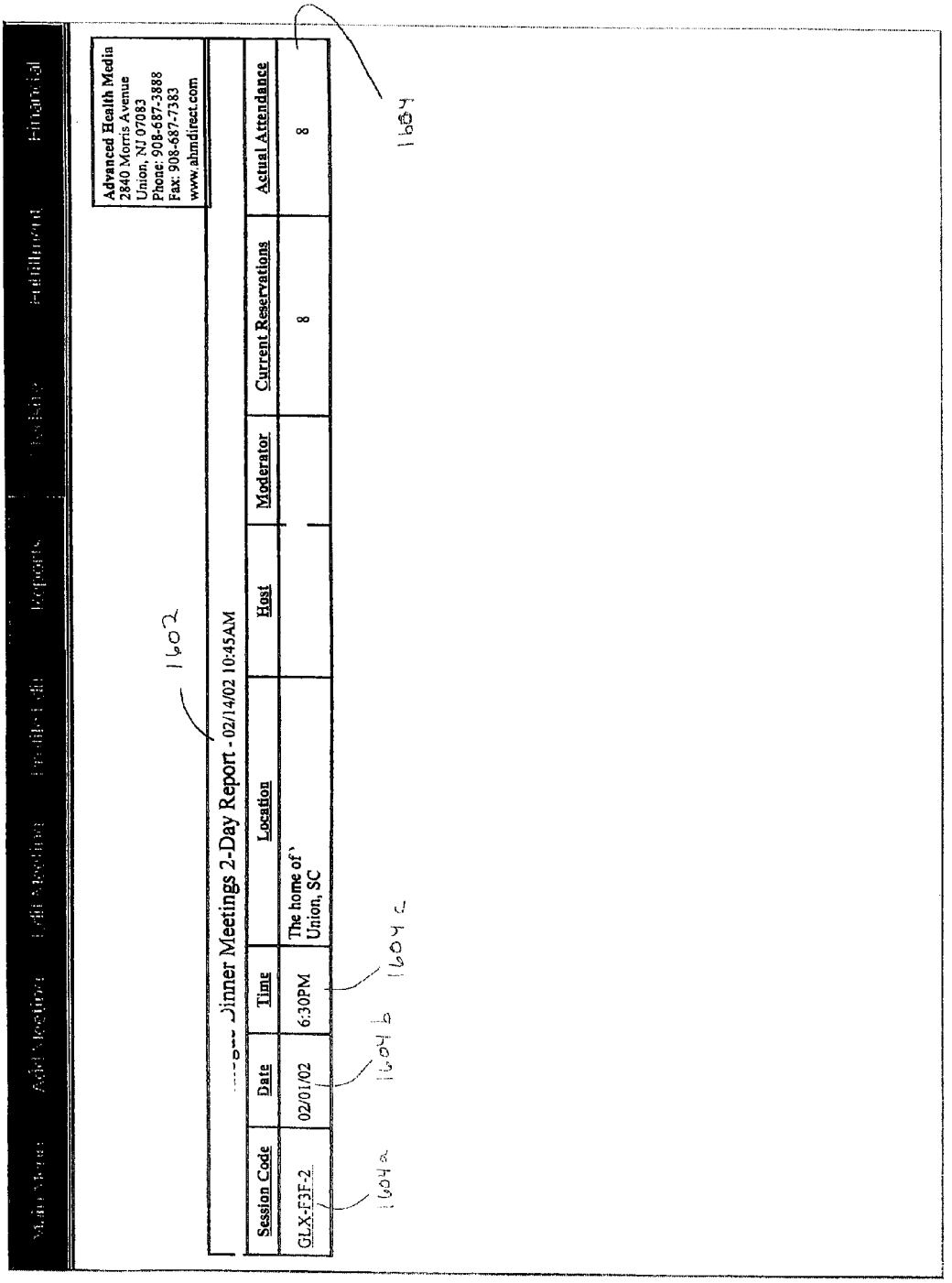

Advanced Health Media
2840 Morris Avenue
Union, NJ 07083
Phone: 908-687-3888
Fax: 908-687-7383
www.ahmdirect.com
Dinner Meetings 2-Day Report - 02/14/02 10:45AM
Session Code
Date
Time
Location
Host
Moderator
Current Reservations
Actual Attendance
GLX-F3F-2
02/01/02
6:30PM
The home of
Union, SC
8
8
1602
1604a
1604b
1604c
1604d

FIGURE 57

Home | Programs | Speakers | Topics | Reports | Profile | Documents | Help

Report List

Please select the desired report below.

Financial Reports

Program Costs
Program Summary
Budget Summary
Detailed Program Costs

Attendance Reports

Att ndance Summary

Program Reports

Evaluation Summary

Speaker Reports

Contract List
Speaker Honoraria

Administrative Reports

CME Rep Agreements Received by
Field Sales Report
Marketing Financial Report
Login Summary Report

Figure 58

Home Programs Speakers Topics Reports Profile Documents Help

Report List **Report**

Figure 59

Export to Excel

Program Costs Report

Meeting Cod	Consultant	Territory	Speaker	Topic	Type	Date	Status	Estimated Expenses	Actual Expenses To Date
FHC-GR-7110		A087110		Contraception		02/28/2003	Completed	$2,664.28	$2,664.28
FHC-GR-7116		A087116		Contraception		01/10/2003	Completed	$3,359.21	$3,359.21
FHC-GR-7122		A087122		Contraception		05/14/2003	Completed	$2,700.00	$2,740.78
FHC-CSC-7076		A057076		Demystifying PMS: The Chemical/Hormonal Spectrum		02/06/2003	Completed	$569.09	$569.09
FHC-CSC-7064		A057064		Demystifying PMS: The Chemical/Hormonal Spectrum		01/08/2003	Completed	$232.99	$232.99
FHC-CSC-7066		A057066		Demystifying PMS: The Chemical/Hormonal Spectrum		01/16/2003	Completed	$558.98	$558.98
FHC-CSC-7066-2		A057066		Demystifying PMS: The Chemical/Hormonal Spectrum		06/28/2003	Cancelled	$100.00	$0.00
FHC-GR 7114		A087114		Contraception		05/07/2003	Cancelled	$0.00	$0.00
FHC-GR 7064		A057064		HRT		03/06/2003	Completed	$2,503.00	$3,262.13
FHC-GR 7360		C057360		Contraception		02/04/2003	Completed	$1,517.25	$1,517.25
FHC-CSC-7370		C067370		Demystifying PMS: The Chemical/Hormonal Spectrum		01/06/2003	Completed	$325.00	$299.10
FHC-CSC-7088		A067088		Demystifying PMS: The Chemical/Hormonal Spectrum		01/08/2003	Completed	$139.85	$139.85

Home Programs Sp akers Topics Reports Profile Documents Help

Report List Report

Export to Excel

Pr gram Summary Report

Territory	Rep/DM	CME	Grand Rounds	Promotional	CSC
A		76	41	11	47
B		84	16	15	35
C		52	29	11	31
D		50	13	11	25
E		75	19	8	20
N		0	0	0	8
	Total	337	118	56	166

Figure 60

Home Programs Speak rs Topics Reports Profile Docum nts Help

Report List **Report**

Export to Excel

Budget Summary R port

Territory	Rep/DM	Budget	Estimated Costs	Actual Costs To Date	Estimated Remaining Budget
A		$353,155.00	$317,204.37	$235,926.74	$35,950.63
B		$337,286.93	$376,821.30	$287,979.02	($39,534.37)
C		$260,008.82	$270,403.02	$218,049.88	($10,394.20)
D		$251,958.54	$249,234.87	$203,507.28	$2,723.67
E		$311,866.38	$317,009.59	$252,154.35	($5,143.21)
	Total	**$1,514,275.67**	**$1,530,673.15**	**$1,197,617.27**	**($16,397.48)**

Figure 61

Home Programs Speakers Topics Reports Profile Documents Help

Report List **Report**

Export to Excel

Attendance Summary

Territory	Rep/DM	Num Attendees	Class 1 %	Class 2 %	Class 3 %	Class 4 %	Undefined Class %
A		1463	21%	11%	2%	17%	48%
C		1239	26%	12%	3%	10%	49%
E		1386	19%	8%	7%	15%	51%
B		1383	30%	9%	4%	9%	48%
D		1335	25%	6%	4%	13%	51%

Figure 62

Home Programs Speakers Topics Reports Profile Documents Help

Report List Rep rt

Figure 63

Export to Excel

Program Evaluation Summary

Speaker							
Question	Rating 5	Rating 4	Rating 3	Rating 2	Rating 1	Count	Average
Demonstrated current knowledge of the topic	161	30	4	1	0	196	4.8
Was an effective presenter	151	31	11	2	1	196	4.7
Effectively met the learning objectives of the program	123	54	12	4	3	196	4.5
Overall speaker rating	138	42	13	1	2	196	4.6
Program							
Question	Rating 5	Rating 4	Rating 3	Rating 2	Rating 1	Count	Average
Program met the learning objectives	118	65	7	3	3	196	4.5
Participant/Speaker Interaction	142	43	9	1	1	196	4.7
Program Materials	120	58	16	2	0	196	4.5
Quality of audiovisuals	126	52	14	4	0	196	4.5
Lighting, seating, general environment	120	55	18	2	1	196	4.5
Food and Beverage	143	43	7	2	1	196	4.7
Overall Program Rating	113	75	6	1	1	196	4.5

Speaker							
Question	Rating 5	Rating 4	Rating 3	Rating 2	Rating 1	Count	Average
Demonstrated current knowledge of the topic	46	10	1	1	1	59	4.7
Was an effective presenter	43	10	3	3	0	59	4.6
Effectively met the learning objectives of the program	33	18	6	1	1	59	4.4
Overall speaker rating	40	14	3	1	1	59	4.5
Program							
Question	Rating 5	Rating 4	Rating 3	Rating 2	Rating 1	Count	Average
Program met the learning objectives	33	22	5	0	0	60	4.5
Participant/Speaker Interaction	32	17	7	4	0	60	4.3
Program Materials	30	22	8	0	0	60	4.4
Quality of audiovisuals	34	22	2	2	0	60	4.5
Lighting, seating, general environment	36	21	3	0	0	60	4.6
Food and Beverage	28	17	9	1	5	60	4.0
Overall Program Rating	31	24	5	0	0	60	4.4

Home Programs Sp akers Topics Reports Profile Documents Help

Report List **Report**

Export to Excel

Contract List

Name	City	State	Territory Number	Contract Type	Contract Initiation Date	Contract Expiration Date	Contract Status	Consultant Type

Figure 64

Home Programs Speakers Topics Reports Profile Documents Help

Report List **Report**

Figure 65

Export to Excel

Speaker Honoraria Report

Name	City	State	Territory Number	Specialty	Meeting Count	YTD Honoraria	Total Honoraria
	Bel Air	MD	A077096		3	$3,000.00	$3,000.00
	Woodbridge	VA	B057210	OBG	1	$750.00	$750.00
	New York	NY	A017010		1	$750.00	$750.00
	New York	NY	A017008	OBG	30	$51,800.00	$51,800.00
	Loveland	OH	C067382	OBG	1	$1,000.00	$1,000.00
	Cordova	TN	D027448	OBG	2	$2,000.00	$2,000.00
	Norfolk	VA	B057214	OBG	4	$5,400.00	$5,400.00
	Los Angeles	CA	E057620	OBG	5	$9,500.00	$9,500.00
	Orange	CT	A027018	OBG	3	$2,500.00	$2,500.00
	Vernal	UT	E027570		1	$1,650.00	$1,650.00
	Greenville	NC	B027170	OBG	1	$1,000.00	$1,000.00
	Salem	MA	A087118	OBG	3	$3,000.00	$3,000.00
	Syracuse	NY	A097128	OBG	1	$1,000.00	$1,000.00
	South Bend	IN	C047344	OBG	1	$1,000.00	$1,000.00
	Richmond	VA	B057218		2	$1,000.00	$1,000.00
	Atlanta	GA	B037176	OBG	5	$8,000.00	$8,000.00
	Baltimore	MD	A057064	OBG	3	$2,500.00	$2,500.00
	Chesterfield	MO	D037464	OBG	3	$4,500.00	$4,500.00
	Omaha	NE		OBG	2	$500.00	$500.00
	Kokomo	IN	C047334		1	$500.00	$500.00
	Hilliard	OH	C087406	OBG	2	$1,500.00	$1,500.00
	Albuquerque	NM	D077528		1	$500.00	$500.00
	Albany	NY	A097126	OBG	1	$750.00	$750.00
	Wellesley	MA		OBG	2	$1,250.00	$1,250.00
	Pittsburgh	PA	A077108	OBG	4	$5,500.00	$5,500.00
	Atlanta	GA	B037176	OBG	1	$750.00	$750.00
	Stratford	NJ		OBG	1	$1,000.00	$1,000.00
	Mill Valley	CA	E037592	OBG	2	$3,000.00	$3,000.00
	West Bloomfield	MI	C057354		6	$6,000.00	$6,000.00
	Orange	CA	E017556	OBG	1	$1,500.00	$1,500.00
	Brooklyn	NY	A017014	OBG	1	$1,000.00	$1,000.00
	Casselberry	FL	B017140		3	$2,750.00	$2,750.00
	Morristown	NJ	A047050	OBG	13	$18,700.00	$18,700.00
	Chesterfield	MO	D037464	OBG	28	$42,000.00	$42,000.00
	Arlington Heights	IL	C097426	OBG	1	$1,000.00	$1,000.00
	Dallas	TX	D017434	OBG	4	$3,450.00	$3,450.00
	Centerport	NY	A017002	OBG	1	$750.00	$750.00
	San Antonio	TX	E087674	OBG	6	$9,000.00	$9,000.00
	Ventura	CA	E067644	OBG	1	$1,500.00	$1,500.00
	Miami	FL	B047200	OBG	5	$9,000.00	$9,000.00

Home Programs Speakers Topics Reports Profile Pocuments Help

Report List **Report**

Export t

Field Sales Report

Program Type	Territory	Rep/DM	Total Programs	Completed Programs	Total Actual Costs To Date	Attendees	Call Class 1	Call Class 2	Call Class 3	Call Class 4	No Call Class	Cost Per Attendee	Cos Pro
CSC			166	152	$57,663.18	710	221	48	20	73	441	$81.22	$
Franchise CME			337	248	$940,592.57	3989	1048	412	164	448	2529	$235.80	$3
Grand Rounds			118	82	$164,303.31	1526	223	125	68	290	1178	$107.67	$2
Mirena Promotional			56	46	$158,435.84	621	157	44	32	75	420	$255.13	$3
		Total	677	526	$1,320,994.90	6846	1649	629	284	884	4568	$192.96	$2,5

Figure 66

Home Programs Speakers Topics Reports Profile Documents Help

Report List Report

Exp

Marketing Financial Summary Report

Event Type	Topic	# Complete	Total Pass Through for completed events	Total Mgmt Fees for completed events	Total Expense for completed events	# Pending	Total Pass Through for pending events	total Mgmt Fee for pending events	Total Expense for pending events	Tota Seri
CME Dinner Meeting		1	$2,414.27	$850.00	$3,264.27	0	$0.00	$0.00	$0.00	
CME Dinner Meeting	Greater Contraceptive Choices for Enhancing Health-Related Quality of Life	191	$671,309.20	$152,572.50	$823,881.70	41	$152,460.91	$35,487.50	$187,948.41	$1
CME Dinner Meeting	Reproductive Health Benefits throughout the Lifecycle	74	$270,966.10	$65,992.75	$336,958.85	30	$121,591.28	$25,400.00	$146,991.28	
CSC Meeting		166	$57,663.18	$62,160.00	$119,823.18	0	$0.00	$0.00	$0.00	
Grand Rounds	Contraception	95	$159,655.61	$62,587.50	$222,243.11	20	$32,487.50	$14,250.00	$46,737.50	
Grand Rounds	Greater Contraceptive Choices for Enhancing Health-Related Quality of Life	2	$3,135.57	$1,600.00	$4,735.57	0	$0.00	$0.00	$0.00	
Grand Rounds	HRT	1	$3,262.13	$750.00	$4,012.13	0	$0.00	$0.00	$0.00	
Promotional Dinner Meeting		53	$158,612.34	$42,705.00	$201,317.34	3	$10,527.00	$2,700.00	$13,227.00	
	Total	583	$1,327,018.40	$389,217.75	$1,716,236.15	94	$317,066.69	$77,837.50	$394,904.19	$2,1

Figure 67

Home Programs Speakers Topics Reports Profile Pocuments Help

Report List **Report**

Export to Excel

Login Summary

Territory	Rep/DM	Last Login Date	Total Login Count
A		10/20/2003 2:33:14 PM	28
A01		10/24/2003 4:11:23 PM	24
A017000		10/20/2003 11:20:41 AM	12
A017002		9/3/2003 1:12:32 AM	11
A017004		10/29/2003 5:33:52 PM	8
A017008		10/23/2003 9:37:35 PM	17
A017010		9/22/2003 10:38:23 PM	2
A017012		10/28/2003 6:51:05 PM	11
A017014		10/16/2003 8:32:10 PM	3
A02		10/29/2003 6:52:05 PM	36
A027016		10/24/2003 8:27:27 PM	13
A027018		10/24/2003 5:53:47 PM	23
A027020		10/20/2003 10:09:49 PM	37
A027024		10/29/2003 7:28:32 AM	22
A027028		10/25/2003 6:14:23 PM	19
A03		10/21/2003 10:32:03 AM	29
A034020		6/25/2003 8:47:18 AM	10
A037030		7/16/2003 7:19:37 PM	35
A037032		6/6/2003 5:42:23 PM	12
A037034		10/21/2003 8:39:28 PM	6
A037036		8/6/2003 9:18:45 PM	17
A037038		7/17/2003 10:36:31 PM	8
A037040		8/1/2003 3:21:04 PM	26
A037042		10/21/2003 7:02:52 PM	4
A037044		6/10/2003 11:10:25 PM	10
A04		8/29/2003 11:14:33 AM	13
A044005		10/28/2003 1:47:07 PM	8
A047046		8/26/2003 11:31:35 PM	11
A047048		8/8/2003 6:30:48 PM	12
A047050		5/16/2003 8:07:53 AM	3
A047052		6/30/2003 8:45:48 AM	7
A047054		4/21/2003 10:12:14 PM	2
A047056		10/17/2003 4:36:28 PM	37
A047062		5/20/2003 6:25:57 PM	5
A05		10/24/2003 9:37:12 AM	70
A054150		10/5/2003 7:13:48 PM	16
A054160		9/25/2003 8:56:54 PM	10
A057064		4/16/2003 8:01:27 AM	3
A057066		10/6/2003 10:40:43 AM	9
A057068		5/16/2003 2:41:46 PM	10
A057070		9/16/2003 9:01:18 PM	10
A057072		9/24/2003 7:47:05 AM	10

Figure 68

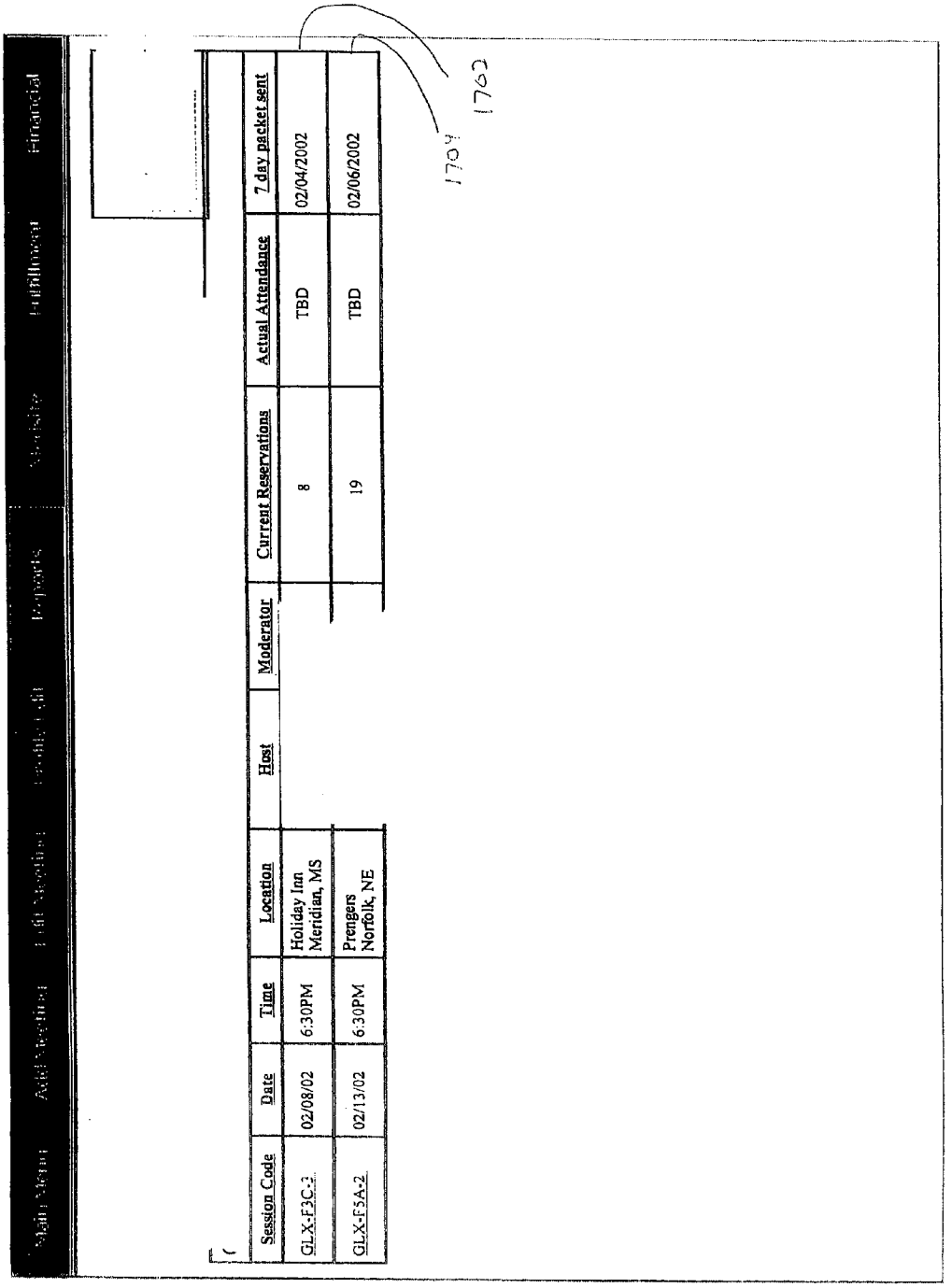

Financial
Fulfillment
Reports
Schedule
Audit Reports
Audit Sessions
Main Menu
Session Code
Date
Time
Location
Host
Moderator
Current Reservations
Actual Attendance
7 day packet sent
GLX-F3C-2
02/08/02
6:30PM
Holiday Inn Meridian, MS
8
TBD
02/04/2002
GLX-F5A-2
02/13/02
6:30PM
Prengers Norfolk, NE
19
TBD
02/06/2002
1704
1702

FIGURE 69

Main Menu | Add Meeting | Edit Meeting | Modify Bill | Reports | Decision | Fulfillment | Financial

Status	Count
Cancelled	20
Completed	106
Set-up complete	7
Total	133

1802 1804

1806 1808 1810 1812 1814 1816 1818 1820 1822 1824 1826 1828

Session Code	Date/Time	Location	Host	Host VM Ext	Add. Host	Moderator	Speaker #1	Speaker #2	Speaker #3	Meeting Topic	Current Reservations	Actual Attendance	Status
GLX-F1F	12/04/01 6:30PM	Laurel Restaurant Boston, MA		80254						Type II Diabetes	0	0	Completed
GLX-F3C	01/08/02 6:30PM	Schimmel's Jackson, MS		87608						Type II Diabetes	5	7	Completed
GLX-F3C-2	01/09/02 7:30AM	Jackson Medical Clinic Jackson, MS		87608						Type II Diabetes	0	0	Completed
GLX-F3C-3	02/08/02 6:30PM	Holiday Inn Meridian, MS		87608						Type II Diabetes	8	0	Completed
GLX-F3C-4	01/29/02 6:30PM	Fairhope Inn & Restaurant Fairhope, AL		87608						Type II Diabetes	5	11	Completed
GLX-F3F	01/17/02 6:30PM	Cypress Charleston, SC								Type II Diabetes	12	14	Completed
GLX-F3F-2	02/01/02 6:30PM	The home of Vivian Clark, MD Union, SC								Type II Diabetes	8	8	Completed
GLX-F3F-3	01/25/02 7:00PM	The Peddler Spartanburg, SC								Type II Diabetes	11	25	Completed
GLX-F3J	02/07/02 7:00PM	Antiquarian Restaurant Lakeland, FL		88142						Type II Diabetes	16	12	Completed

FIGURE 70

Main Menu | Add Meeting | Edit Meeting | Profile Edit | Reports | Monitor | Fulfillment | Financial

Session Code	Date	Time	Location	Host	Moderator	Current Reservations	Actual Attendance
GLX-F3C-3	02/08/02	6:30PM	Holiday Inn Meridian, MS			8	TBD
GLX-F3J	02/07/02	7:00PM	Antiquarian Restaurant Lakeland, FL			16	12
GLX-F5A-2	02/13/02	6:30PM	Prengers Norfolk, NE			19	TBD
GLX-F5B	02/21/02	6:00PM	Manny's Steakhouse Minneapolis, MN			0	TBD
GLX-F5B-2	02/20/02	6:30PM	D'Amico Cucina Minneapolis, MN			1	TBD
GLX-F5B-3	02/21/02	7:30AM	In Progress			0	TBD
GLX-F5B-4	02/21/02	12:30PM	In Progress			0	TBD
GLX-F5B-5	02/20/02	2:30PM	In Progress			0	TBD

FIGURE 71

Main Menu | Add Meeting | Edit Meetings | Profile Edit | Reports | Website | Fulfillment | Financial

2002 2004 2006 2008 2010 2012 2014 2016 2018 2020

Session Code	Meeting Date/Time	Location Name	Host Name	Date Invitation Mailed	Number of Invitation Mailed	Acceptances	Actual Attendance	Roster Returned	Meeting Status
GLX-F1F	12/04/01 6:30PM	Laurel Restaurant		11/27/2001	0	0	0		Completed
GLX-F3C	01/08/02 6:30PM	Schimmel's		12/12/2001	9	5	7	01/28/02	Completed
GLX-F3C-2	01/09/02 7:30AM	Jackson Medical Clinic			0	0	0		Completed
GLX-F3C-3	02/08/02 6:30PM	Holiday Inn			9	8	0		Completed
GLX-F3C-4	01/29/02 6:30PM	Fairhope Inn & Restaurant		01/08/2002	12	5	11	02/12/02	Completed
GLX-F3F	01/17/02 6:30PM	Cypress		12/03/2001	17	12	14	01/24/02	Completed
GLX-F3F-2	02/01/02 6:30PM	The home of Vivian Clark, MD			8	8	8	02/11/02	Completed
GLX-F3F-3	01/25/02 7:00PM	The Peddler			34	11	25	01/29/02	Completed
GLX-F3J	02/07/02 7:00PM	Antiquarian Restaurant		12/12/2001	17	16	12	02/12/02	Completed
GLX-F3J-2	02/06/02 7:00PM	DelFrisco's		12/12/2001	20	16	16	02/11/02	Completed
GLX-F5A	01/26/02 6:00PM	French Cafe		12/27/2001	8	7	5	02/04/02	Completed
GLX-F5A-2	02/13/02 6:30PM	Prengers			19	20	TBD		Set-up complete
GLX-F5A-3	03/15/02 6:30PM	Minerva's			0	0	TBD		Set-up complete
GLX-F5B	02/21/02 6:00PM	Manny's Steakhouse		01/22/2002	0	3	TBD		Set-up complete

FIGURE 72

Main Menu | Add Meeting | Edit Meeting | Profile Edit | Reports | Mailing | Fulfillment | Financial

Rosters returned	91 - 86% (percent of completed meetings)
Total invitations mailed	1620
Total RSVPs	685 - 42% (percent of invitations mailed)
Average RSVPS	7.5
Total attendance	880 - 128% (percent of RSVPs)
Average attendance	9.7

2104

2102 2106 2108 2110 2112 2114 2116

Session Code	Date	DBM	Invitations Mailed	RSVPs	Actual Attendance
GLX-F3C	01/08/02		9	5	7
GLX-F3C-4	01/29/02		12	5	11
GLX-F3F	01/17/02		17	12	14
GLX-F3F-2	02/01/02		8	8	8
GLX-F3F-3	01/25/02		34	11	25
GLX-F3J	02/07/02		17	16	12
GLX-F3J-2	02/06/02		20	16	16
GLX-F5A	01/26/02		8	7	5
GLX-F7F	12/06/01		24	13	21
GLX-J1A	12/05/01		62	2	7
GLX-J1C	12/04/01		7	6	7
GLX-J1C-2	12/12/01		13	9	8
GLX-J1D	12/05/01		11	6	9
GLX-J1F	11/28/01		13	0	12
GLX-J1G	10/18/01		70	14	6
GLX-J1J	11/28/01		58	5	12
GLX-J1K	10/02/01		8	6	5
GLX-J1K-2	09/20/01		29	25	15
GLX-J2A	11/26/01		13	10	9
GLX-J2A-2	12/05/01		20	9	17
GLX-J2B	11/13/01		8	8	2

FIGURE 73

Main Menu | Add Meeting | Edit Meeting | Profile Edit | Reports | Mediaite | Fulfillment | Financial

2202 2204 2206 2208 2210 2212 2214 2216 2218 2220

Meeting Code	Meeting Date/Time	Meeting Status	Speaker Status	Date Request Received	Date Speaker Confirmed	Date Contract Returned	Date Invitations Mailed	Date 7-day Sent	Date Roster Returned
GLX-F1F	12/4/2001 6:30:00 PM	Completed	Confirmed	11/27/2001	11/27/2001		11/27/2001		
GLX-F3C	1/8/2002 6:30:00 PM	Completed	Confirmed	12/03/2001	12/03/2001		12/12/2001	01/02/2002	01/28/2002
GLX-F3C-2	1/9/2002 7:30:00 AM	Completed	Confirmed	12/03/2001	12/03/2001				
GLX-F3C-3	2/8/2002 6:30:00 PM	Completed	Confirmed		01/02/2002			02/04/2002	
GLX-F3C-4	1/29/2002 6:30:00 PM	Completed	Confirmed	01/07/2002	01/07/2002		01/08/2002	01/22/2002	02/12/2002
GLX-F3F	1/17/2002 6:30:00 PM	Completed	Confirmed	11/26/2001	11/30/2001		12/03/2001	01/10/2002	01/24/2002
GLX-F3F-2	2/1/2002 6:30:00 PM	Completed	Confirmed	12/19/2001	01/07/2002			01/24/2002	02/11/2002
GLX-F3F-3	1/25/2002 7:00:00 PM	Completed	Confirmed	12/19/2001	01/07/2002			01/18/2002	01/29/2002
GLX-F3J	2/7/2002 7:00:00 PM	Completed	Confirmed	11/20/2001	12/04/2001		12/12/2001	01/30/2002	02/12/2002
GLX-F3J-2	2/6/2002 7:00:00 PM	Completed	Confirmed	11/20/2001	12/04/2001		12/12/2001	01/30/2002	02/11/2002
GLX-F5A	1/26/2002 6:00:00 PM	Completed	Confirmed	12/10/2001	12/26/2001		12/27/2001	01/21/2002	02/04/2002
GLX-F5A-2	2/13/2002 6:30:00 PM	Set-up complete	Confirmed	12/10/2001	12/12/2001	12/13/2001		02/06/2002	
GLX-F5A-3	3/15/2002 6:30:00 PM	Set-up complete	Confirmed	12/19/2001	01/07/2002				
GLX-F5B	2/21/2002 6:00:00 PM	Set-up complete	Confirmed	01/10/2002	01/14/2002		01/22/2002	02/13/2002	

FIGURE 74

Main Menu | Add Meeting | Edit Meeting | Profile Edit | Reports | Modules | Fulfillment | Financial

Client:	
Brand:	
Project:	
Date:	2/14/2002
[Excel Format]	

2302

Meeting Code	Meeting Date	Business Unit	Geography	Meeting Type	Meeting Format	Host	Miscellaneous	Attendee Honorarium	(E) Spkr Air	Speaker Expenses	(T) Spkr Honorarium	(E) Spkr Honorarium	Entertainment	Venu Room Fee
GLX-F1F	12/04/2001			Promotional	Dinner Meeting		$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.
GLX-F3C	01/08/2002			Promotional	Dinner Meeting		$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.
GLX-F3C-2	01/09/2002			Promotional	Dinner Meeting		$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.
GLX-F3C-3	02/08/2002			Promotional	Dinner Meeting		$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.
GLX-F3C-4	01/29/2002			Promotional	Dinner Meeting		$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.
GLX-F3F	01/17/2002			Promotional	Dinner Meeting		$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.
GLX-F3F-2	02/01/2002			Promotional	Dinner Meeting		$0.00	$0.00	$0.00	$292.40	$0.00	$0.00	$0.00	$0.
GLX-F3F-3	01/25/2002			Promotional	Dinner Meeting		$19.26	$0.00	$0.00	$263.73	$0.00	$0.00	$0.00	$0.
GLX-F3J	02/07/2002			Promotional	Dinner Meeting		$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.
GLX-F3J-2	02/06/2002			Promotional	Dinner Meeting		$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.
GLX-F5A	01/26/2002			Promotional	Dinner Meeting		$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.
GLX-F7F	12/06/2001			Promotional	Dinner Meeting		$0.00	$0.00	$0.00	$526.00	$0.00	$0.00	$0.00	$0.

FIGURE 75

Detailed Program Costs

Home Programs Speakers Topics Reports Profile Documents Help

Report List | Report

Export to Excel

Territory	Rep/DM	Total Estimated Costs	Total Actual Costs To Date	Estimated Travel	Actual Travel To Date	Estimated Honoraria	Actual Honoraria To Date	Estimated AV	Actual AV To Date	Estimated Meeting Costs	Actual Meeting Costs To Date
A		$240,127.85	$187,438.93	$14,905.00	$4,085.50	$86,050.00	$72,950.00	$13,788.77	$7,099.65	$102,935.08	$103,403.78
B		$340,916.33	$306,901.24	$25,903.01	$20,377.54	$96,700.00	$97,300.00	$18,003.64	$10,880.54	$171,903.68	$178,343.16
C		$222,524.13	$193,578.55	$22,981.03	$21,603.93	$71,225.00	$69,725.00	$10,627.12	$4,552.12	$101,593.98	$97,897.60
D		$214,889.59	$180,190.99	$17,455.96	$12,977.05	$60,125.00	$60,475.00	$9,231.33	$5,702.55	$101,004.67	$101,036.39
E		$289,678.94	$254,435.23	$22,238.10	$12,541.24	$92,199.85	$94,199.85	$17,483.12	$15,348.80	$129,869.88	$132,345.34
	Total	$1,308,136.84	$1,122,544.94	$103,481.10	$71,585.16	$396,299.85	$394,640.85	$69,133.98	$43,583.66	$607,307.29	$612,826.27

Figure 76

CME Rep. Agreement

	A	B	C	D	N
1	District	Territory	First Name	Last Name	Rep Agreement Rec'd
2		F-NSD			
3	A	A01			1/21/2003
4	A	A02			
5	A	A03			1/15/2003
6	A	A04			1/14/2003
7	A	A05			
8	A	A06			1/21/2003
9	A	A07			
10	A	A08			1/13/2003
11	A	A09			1/15/2003
12	A01	4010			1/13/2003
13	A01	7000			1/14/2003
14	A01	7002			
15	A01	7004			1/13/2003
16	A01	7008			1/14/2003
17	A01	7010			1/13/2003
18	A01	7012			
19	A01	7014			
20	A02	4210			1/14/2003
21	A02	7016			1/13/2003
22	A02	7018			
23	A02	7020			1/13/2003
24	A02	7022			1/15/2003
25	A02	7024			1/13/2003
26	A02	7026			1/14/2003
27	A02	7028			1/13/2003
28	A03	4020			1/15/2003
29	A03	7030			
30	A03	7032			1/13/2003
31	A03	7034			1/15/2003
32	A03	7036			
33	A03	7040			1/13/2003

Figure 77

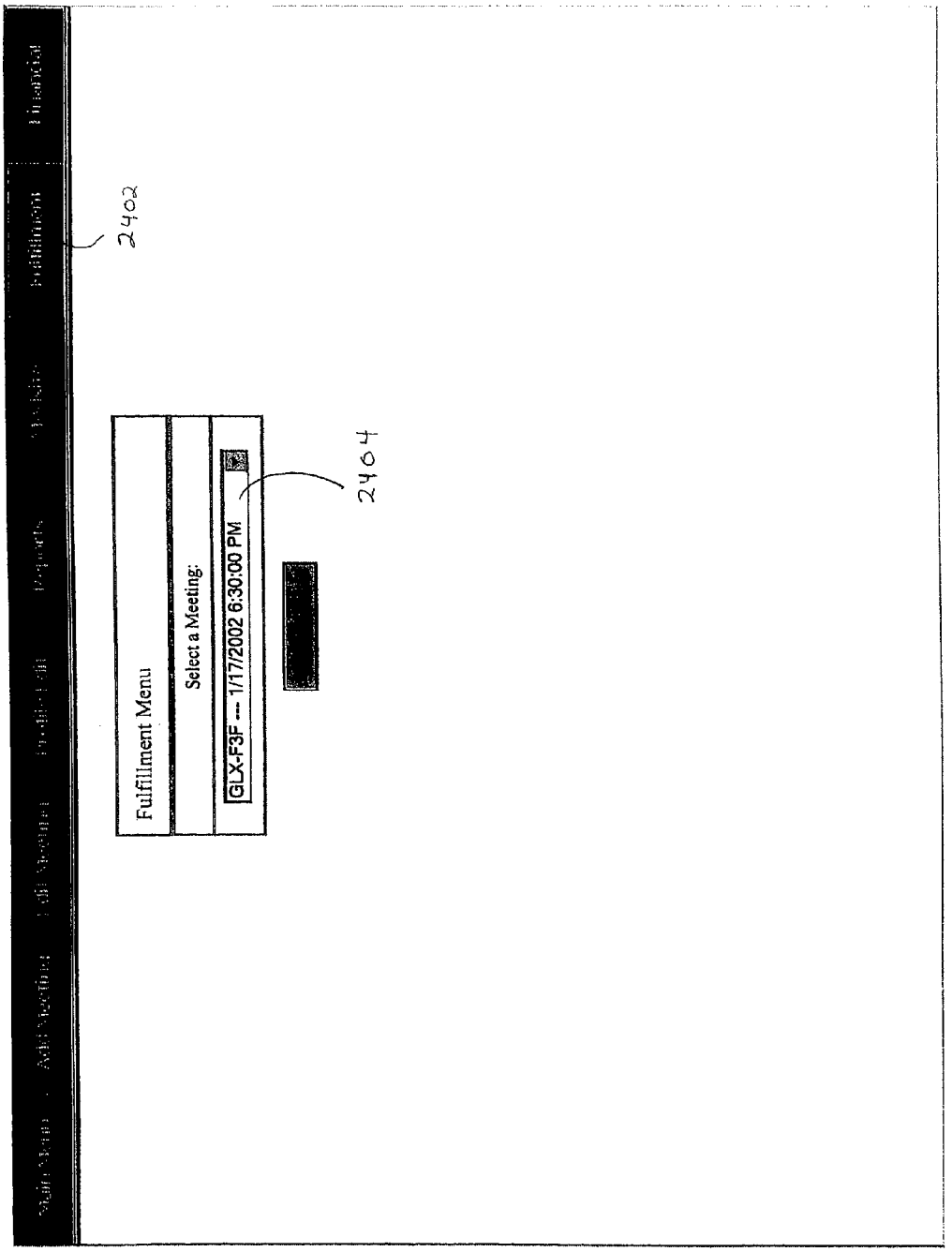

2402
Fulfillment Menu
Select a Meeting:
GLX-F3F --- 1/17/2002 6:30:00 PM
2404

FIGURE 78

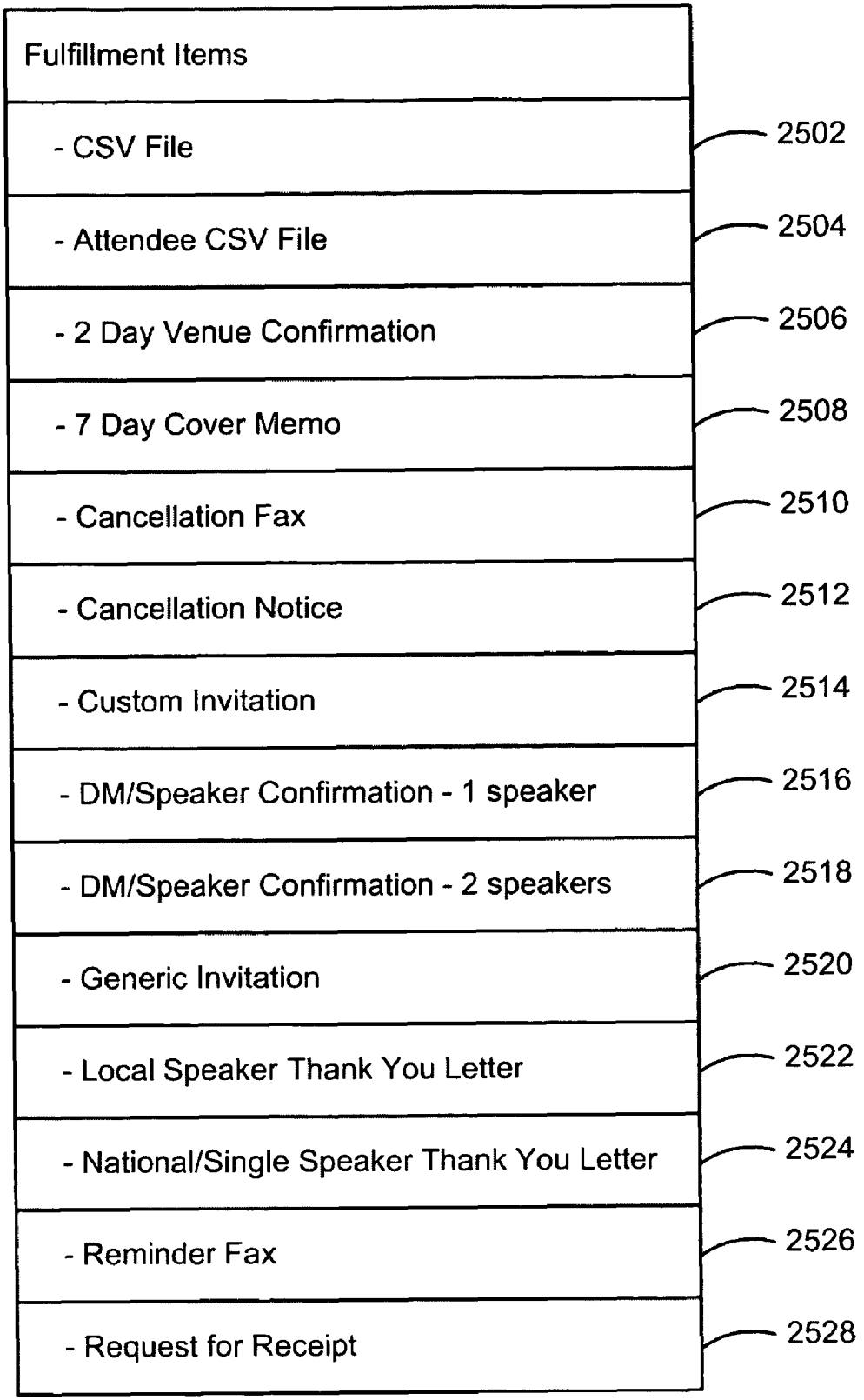

Fulfillment Items
- CSV File
2502
- Attendee CSV File
2504
- 2 Day Venue Confirmation
2506
- 7 Day Cover Memo
2508
- Cancellation Fax
2510
- Cancellation Notice
2512
- Custom Invitation
2514
- DM/Speaker Confirmation - 1 speaker
2516
- DM/Speaker Confirmation - 2 speakers
2518
- Generic Invitation
2520
- Local Speaker Thank You Letter
2522
- National/Single Speaker Thank You Letter
2524
- Reminder Fax
2526
- Request for Receipt
2528

FIGURE 79

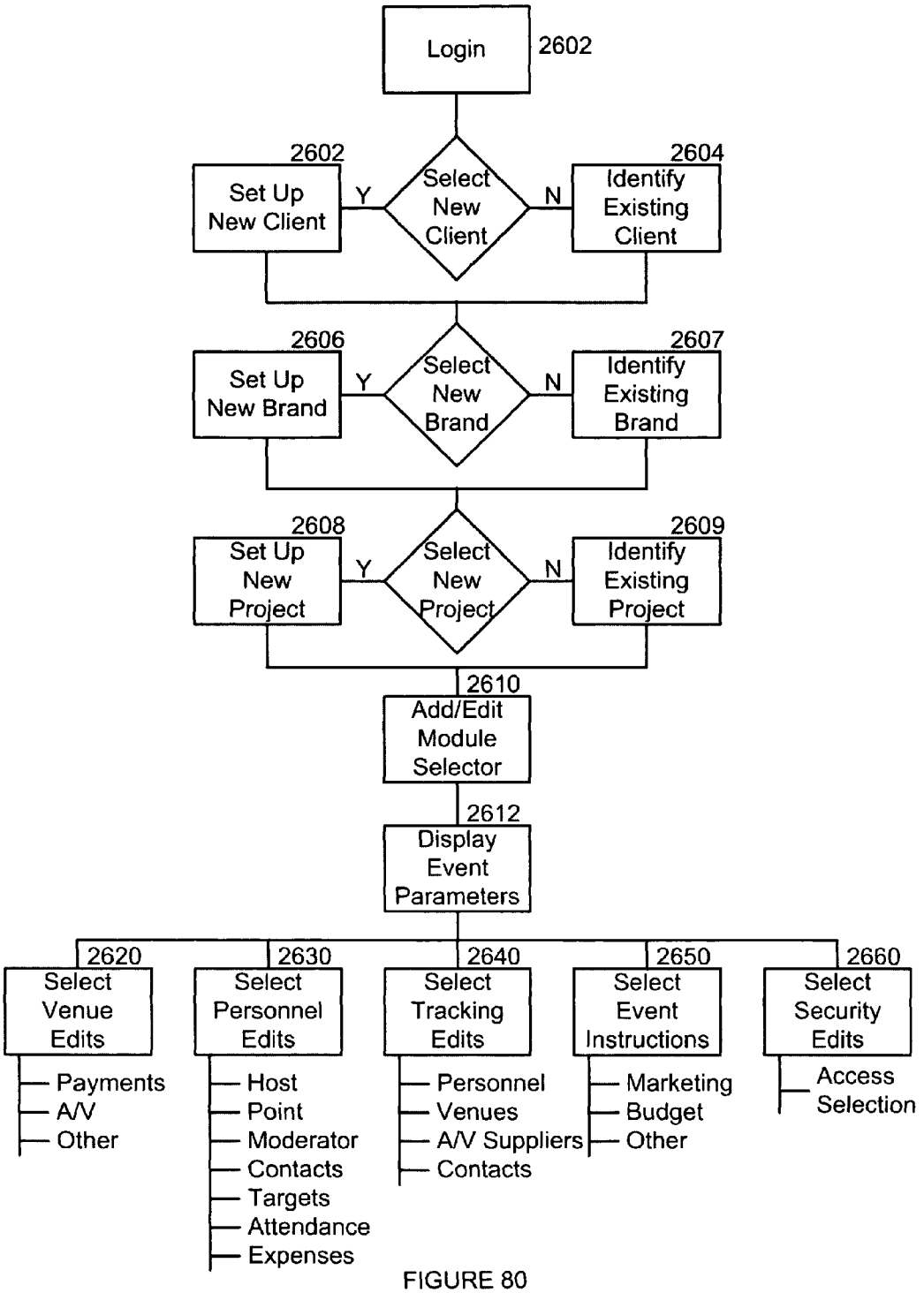

Login
2602
2602
Set Up New Client
Y
Select New Client
N
2604
Identify Existing Client
2606
Set Up New Brand
Y
Select New Brand
N
2607
Identify Existing Brand
2608
Set Up New Project
Y
Select New Project
N
2609
Identify Existing Project
2610
Add/Edit Module Selector
2612
Display Event Parameters
2620
Select Venue Edits
Payments
A/V
Other
2630
Select Personnel Edits
Host
Point
Moderator
Contacts
Targets
Attendance
Expenses
2640
Select Tracking Edits
Personnel
Venues
A/V Suppliers
Contacts
2650
Select Event Instructions
Marketing
Budget
Other
2660
Select Security Edits
Access Selection

FIGURE 80

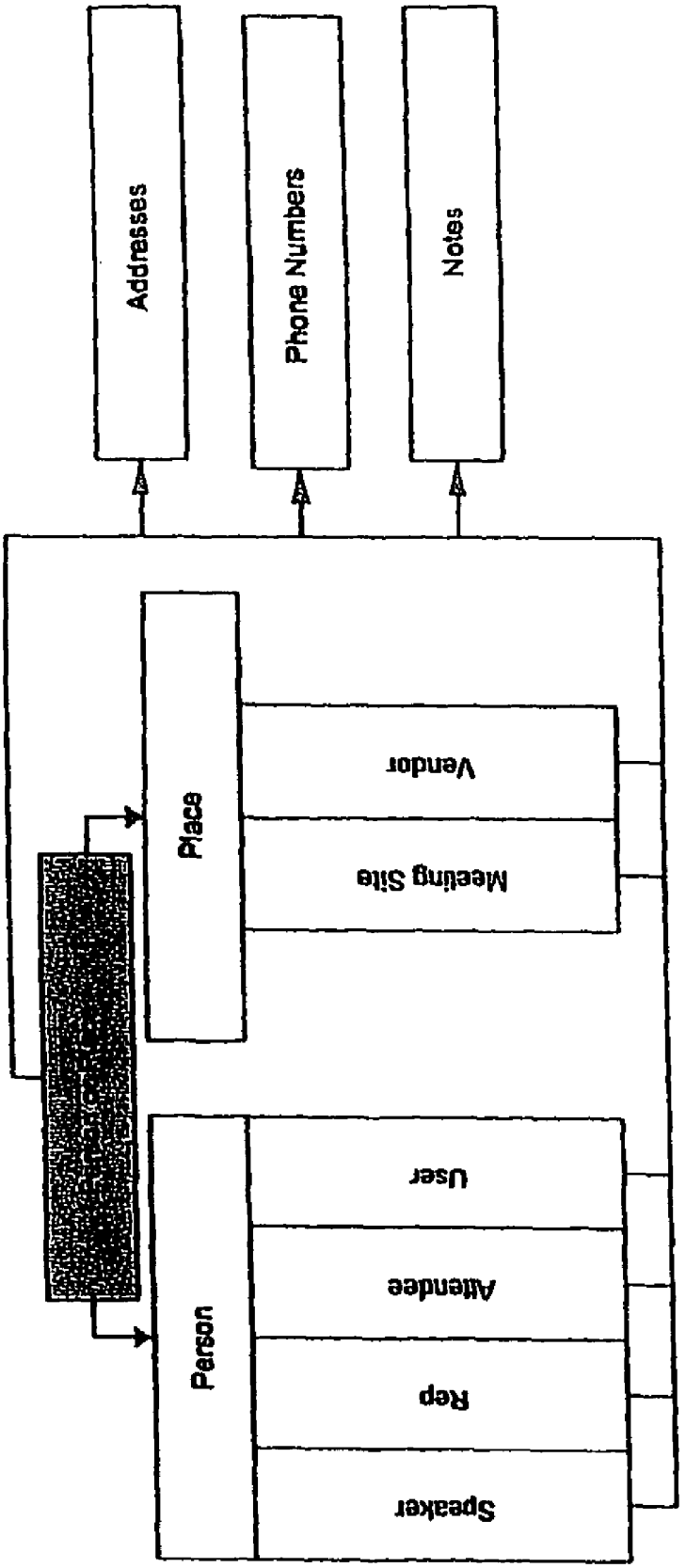

Person
Place
Speaker
Rep
Attendee
User
Meeting Site
Vendor
Addresses
Phone Numbers
Notes

FIGURE 81

30

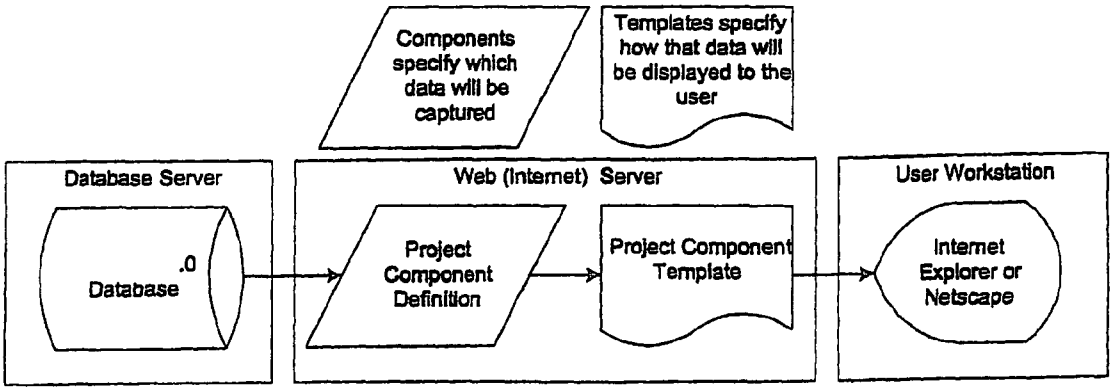

Components specify which data will be captured
Templates specify how that data will be displayed to the user
Database Server
Database .0
Web (Internet) Server
Project Component Definition
Project Component Template
User Workstation
Internet Explorer or Netscape

FIGURE 82

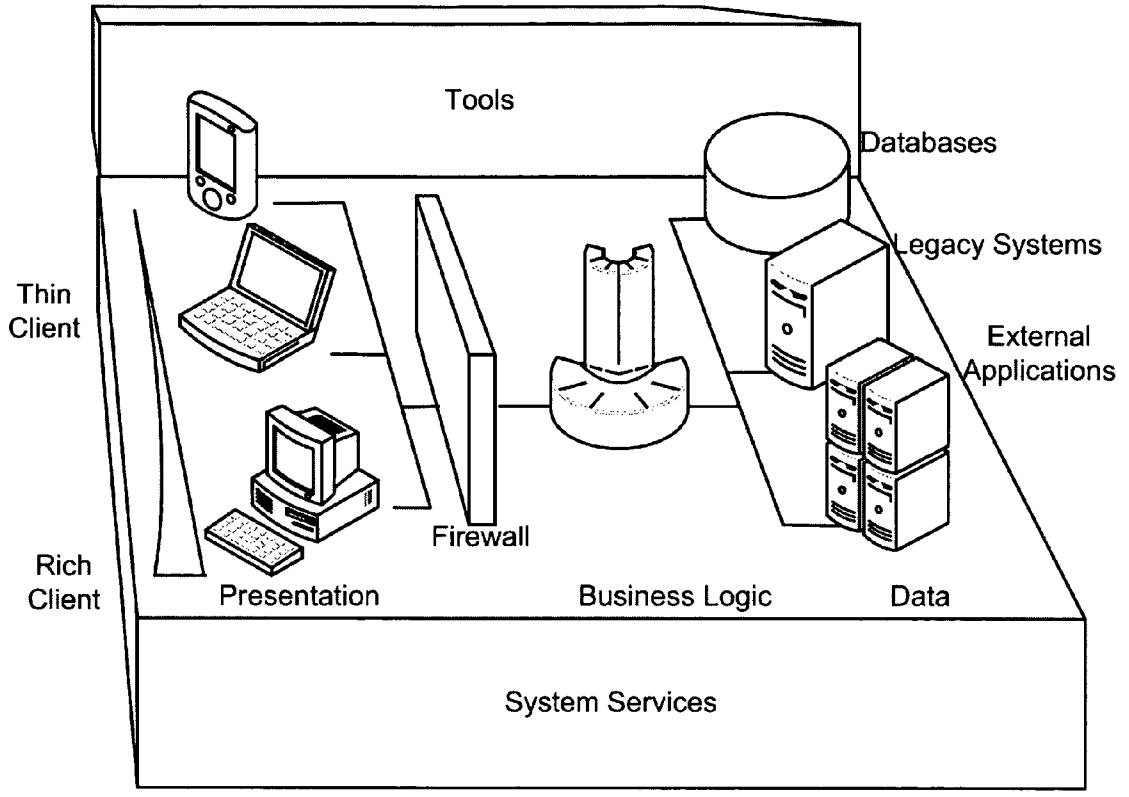

Tools
Databases
Legacy Systems
External Applications
Thin Client
Rich Client
Firewall
Presentation
Business Logic
Data
System Services

FIGURE 83

SYSTEM AND METHOD FOR A PLANNER

CROSS REFERENCE TO RELATED APPLICATIONS

This application is a continuation-in-part of U.S. patent application Ser. No. 10/440,521, filed May 16, 2003, and entitled SYSTEM AND METHOD FOR A PLANNER, which claims priority of U.S. Provisional patent application Ser. No. 60/408,066, filed Sep. 4, 2002, entitled SYSTEM AND METHOD FOR A PLANNER.

FIELD OF THE INVENTION

The invention relates to a planner, and, more specifically, to a system and method for generating and planning events, meetings, or related series of meetings.

BACKGROUND OF THE INVENTION

Today's business environment demands that effective interactions occur between business principals and management, peers, subordinates, supporting departments, suppliers, customers, clients, and authorities. Often, these interactions are organized as meetings between individuals or groups at various locations, and under varying circumstances. The planning and execution of such meetings, and the associated logistics, can become very disorganized and costly if important parameters are missed, if records are lost, or if the meeting planning becomes so complex that many meeting staff members need be employed to realize the event. Additionally, the organization and accounting of costs associated with the organizing of the event, the event location rental, the payment of speakers, the cost of services, such as food, lodging, administrative cost, mailings, to mention a few, are often overlooked, not well controlled, or badly managed and/or recorded. One criticism that meeting planners and attendees often express concerns the distribution of basic updated information concerning a meeting. For example, as meeting planning becomes more mature, problems may arise with venue, the availability of speakers or attendees, or services, such that the place, time, and content of a meeting, may change. Dissemination of this basic knowledge to all who are interested in a meeting is key to maintaining coherency in planning and harmony among planners, customers and attendees alike. Channels of communication between planners in different companies and divisions in different cities is an additional problem that must be overcome.

Thus, there is a need for an invention that provides an integrated solution for event planning, organization, execution, and cost accounting. The present invention attempts to address these concerns by providing an integrated, remote, application that can assist event planners in conceptualizing, organizing, realizing, and monitoring event planning and execution, and data gathering.

SUMMARY OF THE INVENTION

The present invention includes an planner apparatus. The planner apparatus includes a project management module, wherein at least one information item associated with the event is generated, an event logistics module, wherein at least recruiting of individuals for attendance at the event, selection of venue and speakers for the event, and travel logistics for the event, in accordance with the at least one information item, are monitored, at least one database, wherein the at least one information item, and wherein at least one of the recruiting,

venue, speakers, and travel logistics are stored, a fulfillment request module, wherein fulfillment of tasks associated with the at least one database is performed, and a reporting module, wherein data associated with the event, in accordance with the at least one information item and at least one of the recruiting, venue, speakers, and travel logistics, is provided to a user.

The present invention additionally includes a planning system. The planning system includes at least one business rule remote from at least one client, a meeting editor, wherein at least one meeting may be generated for the at least one client by the meeting editor in accordance with at least one of the at least one business rule, and at least one tracker communicatively connected to the meeting editor, wherein the at least one tracker tracks at least two data items selected from the group consisting of invitees to at least one of the at least one meetings, respondents to invitations to the meeting, at least one speaker of the meeting, at least one host of the meeting, finances of the meeting, and a venue of the meeting, and wherein the at least one tracker communicates the at least two data items with the meeting editor.

The meeting editor may include a meeting set-up module for setting up each meeting, a meeting manager for managing each set-up meeting, a fulfillment request form manager, a reporter, an attendance listing manager, an invitee listing manager, a speaker listing manager, task listing manager, or a security listing manager, and a selector for selecting at least one of the invitees to at least one of the at least one meetings, the respondents to invitations to the meeting, the at least one speaker of the meeting, the at least one host of the meeting, the finances of the meeting, and the venue of the meeting for tracking by the tracker.

The at least one tracker may include at least one database for each meeting. The at least one database may include at least one data attribute selected from the group consisting of a meeting code for the meeting, and at least one of a meeting date, a meeting time, a meeting type, a meeting status, a meeting number, a client meeting number, or data attributes of the at least one speaker and the venue, wherein at least one of the at least one speaker and the venue are relationally linked to at least one of the meeting code and the meeting date. The planning may additionally include a finance tracker.

The present invention may additionally include a method for planning a meeting utilizing an application remote from a planner of the meeting. The method may include the receiving of a logging onto the application, receiving a meeting identifier, receiving a selection of at least one venue for the meeting, receiving an identification of participants for the meeting, sending the participants invitations to the meeting, assembling statistics on replies to the invitations, sending reminder notices to the participants upon the assembling of statistics, tracking expenses for the meeting, and generating reports concerning the meeting.

BRIEF DESCRIPTION OF THE DRAWINGS

Understanding of the present invention will be facilitated by consideration of the following detailed description of a preferred embodiment of the present invention taken in conjunction with the accompanying drawings, in which like numerals refer to like parts and in which:

FIG. **1** is a block diagram of the present invention;

FIG. **2** is an embodiment of a display of the current invention;

FIG. **3** is an embodiment of a display of the current invention;

FIG. **4** is an embodiment of a display of the current invention;

FIG. **5** is an embodiment of a display of the current invention;

FIG. **6** is an embodiment of a display of the current invention;

FIG. **7** is an embodiment of a display of the current invention;

FIG. **8** is an embodiment of a display of the current invention;

FIG. **9** is an embodiment of a display of the current invention;

FIG. **10** is an embodiment of a display of the current invention;

FIG. **11** is an embodiment of a display of the current invention;

FIG. **12** is an embodiment of a display of the current invention;

FIG. **13** is an embodiment of a display of the current invention;

FIG. **14** is an embodiment of a display of the current invention;

FIG. **15** is an embodiment of a display of the current invention;

FIG. **16** is a block diagram of the present invention;

FIG. **17** is an embodiment of a display of the current invention;

FIG. **18** is an embodiment of a display of the current invention;

FIG. **19** is an embodiment of a display of the current invention;

FIG. **20** is an embodiment of a display of the current invention;

FIG. **21** is an embodiment of a display of the current invention;

FIG. **22** is an embodiment of a display of the current invention;

FIG. **23** is an embodiment of a display of the current invention;

FIG. **24** is an embodiment of a display of the current invention;

FIG. **25** is an embodiment of a display of the current invention;

FIG. **26** is an embodiment of a display of the current invention;

FIG. **27** is an embodiment of a display of the current invention;

FIG. **28** is an embodiment of a display of the current invention;

FIG. **29** is an embodiment of a display of the current invention;

FIG. **30** is an embodiment of a display of the current invention;

FIG. **31** is an embodiment of a display of the current invention;

FIG. **32** is an embodiment of a display of the current invention;

FIG. **33** is an embodiment of a display of the current invention;

FIG. **34** is an embodiment of a display of the current invention;

FIG. **35** is an embodiment of a display of the current invention;

FIG. **36** is an embodiment of a display of the current invention;

FIG. **37** is an embodiment of a display of the current invention;

FIG. **38** is an embodiment of a display of the current invention;

FIG. **39** is an embodiment of a display of the current invention;

FIG. **40** is an embodiment of a display of the current invention;

FIG. **41** is an embodiment of a display of the current invention;

FIG. **42** is an embodiment of a display of the current invention;

FIG. **43** is an embodiment of a display of the current invention;

FIG. **44** is an embodiment of a display of the current invention;

FIG. **45** is an embodiment of a display of the current invention;

FIG. **46** is an embodiment of a display of the current invention;

FIG. **47** is an embodiment of a display of the current invention;

FIG. **48** is an embodiment of a display of the current invention;

FIG. **49** is an embodiment of a display of the current invention;

FIG. **50** is an embodiment of a display of the current invention;

FIG. **51** is an embodiment of a display of the current invention;

FIG. **52** is an embodiment of a display of the current invention;

FIG. **53** is an embodiment of a display of the current invention;

FIG. **54** is an embodiment of a display of the current invention;

FIG. **55** is an embodiment of a display of the current invention;

FIG. **56** is an embodiment of a display of the current invention;

FIG. **57** is an embodiment of a display of the current invention;

FIG. **58** is a block diagram of a portion of the current invention;

FIG. **59** is a block diagram of the present invention;

FIG. **60** is a block diagram of the present invention;

FIG. **61** is a block diagram of the present invention;

FIG. **62** is a block diagram of the present invention;

FIG. **63** is a block diagram of the present invention;

FIG. **64** is a block diagram of the present invention;

FIG. **65** is a block diagram of the present invention;

FIG. **66** is a block diagram of the present invention;

FIG. **67** is a block diagram of the present invention;

FIG. **68** is a block diagram of the present invention;

FIG. **69** is a block diagram of the present invention;

FIG. **70** is a block diagram of the present invention;

FIG. **71** is a block diagram of the present invention;

FIG. **72** is a block diagram of the present invention;

FIG. **73** is a block diagram of the present invention;

FIG. **74** is a block diagram of the present invention;

FIG. **75** is a block diagram of the present invention;

FIG. **76** is a block diagram of the present invention;

FIG. **77** is a block diagram of the present invention;

FIG. **78** is a block diagram of the present invention;

FIG. **79** is a block diagram of the present invention;

FIG. **80** is a block diagram of the present invention;

FIG. **81** is a block diagram of the present invention;

FIG. **82** is a block diagram of the present invention;
FIG. **83** is a block diagram of the present invention;

DETAILED DESCRIPTION OF THE INVENTION

It is to be understood that the figures and descriptions of the present invention have been simplified to illustrate elements that are relevant for a clear understanding of the present invention, while eliminating, for purposes of clarity, many other elements found in a typical system and method. Those of ordinary skill in the art will recognize that other elements are desirable and/or required in order to implement the present invention. However, because such elements are well known in the art, and because they do not facilitate a better understanding of the present invention, a discussion of such elements is not provided herein. The disclosure hereinbelow is directed to all such variations and modifications to planning technologies known, and as will be apparent, to those skilled in the art.

The present invention may include a plurality of tools, which may be organized, for example, in accordance with business rules, and which may include a planner, an organizer, an advocate and polling builder, an attendance tracker, a progress tracker, and/or a financial tracker, and which may include at least one of these tools within a communication tool for events and projects, such as corporate meetings, presentations, discussion groups, product development meetings, or any assemblage of people at a place for a common purpose. The present invention may allow designated users to plan and organize an event or project, such as a meeting, on-line over a network, such as the internet, such as by communicating with a remote planning system and/or advocate builder. The present invention may utilize the communication provided by the network, in conjunction with an organized hierarchy of at least one database, in order to allow the organizers of an event to centralize activities necessary to execute a successful meeting or project, for example, into a paperless planning system, thereby improving output and operational efficiency of personnel, such as planning staff, and thereby reducing planning time and costs.

The present invention may enable users to access at least one database to generate, for example, multiple events for different products or projects within an enterprise, such as a client, to invite guests and speakers to at least one of the events, to establish a venue and the support services required at the venue, to track the cost and status of an event, and to permit message-level communication between pre-selected parties having system access. The present invention may be utilized by multiple organizations, wherein each organization may have multiple products or other motivations for multiple events. The users of the system may include, for example, system administrators, meeting planners, meeting attendees, speakers, service suppliers, or other individuals or entities that can contribute to the successful planning and execution of an event.

The present invention may provide an interface for turnkey meeting planning services and real-time meeting information, such as by utilizing a web-based interface. The present invention may thereby provide an interface with summary tables and hyperlinked meetings regarding the meeting information and planning services. After selecting a meeting, and by utilizing a summary status option of a meeting, a user may click on a hyperlink for that summary status to that meeting and the web based interface may load information regarding the meeting selected, for example.

A planning system in accordance with the present invention is shown in FIG. **1**. The planning system may be utilized, for example, for multiple meetings, multiple projects having multiple meetings therefor, and for multiple organizations. Users may plan, track, and/or organize information related to at least one meeting for at least one client. Clients may interact with the planning system to request planning services and acquire information related to a meeting or series of meetings, for example. Clients may additionally execute and track a meeting using the planning system. The planning system may include project set-up and/or management **102**, meeting planning and/or event logistics **104**, and at least one database, such as a person and/or place database **106**, for example. The planning system may also include a fulfillment request form management function **108** and a reporting function **110**, for example. The planning system may be, or may include, for example, a Microsoft Windows distributed internet applications architecture, as discussed further hereinbelow.

The project set-up and/or management **102** may include representative list management, speaker list management, task list management and security and access control functions **102***a-d*. The meeting, planning and/or event logistics **104** may include recruiting and attendance venue selection, speaker selection, representative selection and event and travel logistics **104***a-e*. The database may include an address book, schedules, profiles and note logs **106***a-d*. These functions may be supported by fulfillment request, letter and/or format management **108**, or reporting **110**.

The planning system of FIG. **1** may include this multiplicity of integrated components and at least one logical and/or relational database. A project in the planning system may necessitate or include one or more of the function or modules of FIG. **1**, depending on the requirements of the client. A project is a logical group of at least one logically related meeting. The project set-up module allows a project administrator to customize a project set-up. A project may track meetings, for example, such as meetings related to a given product of the client. A project may also include speakers, venues, client representatives, or recruitment and attendance data, of the at least one meeting, for example. Thus, for each component of the project, there may be a set of data attributes that may be tracked. Some of the data attributes for each component may be required, and others may be used at the administrator's discretion.

The planning system may utilize, for example, dynamic link libraries (DLL) that link the project definition data, such as the project administrator's choice of component and fields, and HTML, XML, or ASPX templates, for example. These DLLs may process the HTML templates before presentation to a user of the interface, replacing tags and information in the HTML template with the defining attributes captured. Thereby, the project administrator may have control of the layout and presentation of the data, and the planning system may thus ensure that capture validation and storage of data is consistent across all projects.

The meeting planner and/or event logistics **104** may include venue selection, speaker selection, representative assignment of a meeting, audio/visual (A/V) supplier selection, and recruiting and attendance, for example. Fields tracked at the meeting level, and entered to, or accessed from, the person/place database, may include meeting date and time, program type, program status, meeting number and client meeting number, for example. Further, one or more speakers may be linked to a meeting. One or more venues may be linked to each meeting, and each venue may be considered a temporary selection until confirmed. Data attributes may thus include person/place attributes, as well as a confirmation flag.

Attendees, recruits, or "targets", may additionally be associated with a meeting. A target tracker may provide an interface to maintain a list of recruits, may import target information provided by a client, may track status and contact history of the targets, may record and track contract information with a target, may record attendance data, and may be within, or associated with, the logistics **104**. For each person in the target list, a flag may indicate if the person was invited, and in what capacity, such as attendee, speaker, moderator, representative, client, guest, or the like, whether the invitee has responded, the type of attendee, the number of guests, and/or the type of recruiting that was used to generate the list. Examples of the type of recruiting may include fax, telephone, representative invitation, guest invitation, and the like.

The reporting may report real time status of sponsored activities in, for example, a tabular format including event schedules, venue information, speaker information, attendance rosters, program tracking and status, and financial information. Reporting may be a real time, internet-based format for secure access from any computer having access to the network, such as the internet or an intranet, on which the planning system is resident. Users may, for example, export and download a report in Microsoft Excel format to a local machine from the reporting module. Pre-defined reports may be available for any selected period. Pre-defined reports may include, for example, multi-day reports, such as a two day report, a seven day report, or a weekly roster report. Other pre-defined reports may include, for example, an invitation report, a summary status report, a results report, an attendance roster, and/or a cumulative attendance report.

A two day report, for example, provides status information, and shows events that will occur two days from the current business date, and may include, for example, the session or meeting code, the date and/or the time of the meeting, the location of the meeting, the host or moderator, current reservations and/or actual attendance, such as for a selected period of two days. A seven day report may thus include the same status information, but for a seven day period from the present date. A weekly roster report may also include the same information but over a week's period, and for a full roster of meetings on a single project.

For example, a user may run a "2-Day Report" everyday in order to list all of the meetings occurring within the next two days. For all meetings listed, the user may print out a Venue Confirmation/Guarantee fax and Speaker Presentation Reminder, if applicable. An audio/visual company may be reminded based on this report, if needed, and final headcount may be listed on this report, for example. Confirmation faxes sent to all of the attendees, speakers, and support personnel may thus be manually or automatically sent in accordance with the report, and may ensure that all meeting parties are appraised of critical meeting parameters.

A user may run a Weekly Roster Report on a specific day, such as, for example, on each Friday. This report may show which programs may be occurring over the next 30 days. The user may generate a weekly roster report by going to the "Reports" section on a toolbar, for example, by choosing a "weekly roster report", and by entering a date.

An invitation report may include, for example, the session or meeting code, the meeting time and date and location, the host name, the date invitations were mailed, the number of invitations mailed, the number of acceptances and/or the roster returned. A status summary report may include, among other things, the session code, the date, time and location of the meeting, the host, the moderator, current reservations, actual data of attendance and the current status of all of the fields. A results report may include the rosters returned, the number of invitations mailed, the total RSVPs, the total attendance, the average attendance, as well as the session code, the date of the meeting, and the invitations returned. A hyperlink within a report may include, or provide a link to, an attendance roster which might also include the session code, the date and time of the meeting, the location, the host, contact information for the host, contact information for the moderator as well as the speaker, the participants and the addresses thereof, as well as actual attendance at the meeting. The cumulative attendance report may report over a variety of events, and may include a brand name or project name, an event ID, meeting code, date and time, names of the host and moderator and the speaker, names of the attendees and the attendees' addresses, specialties of the attendees, as well as other information relevant to a cumulative report.

The fulfillment request/letter and/or form management function **108** may include a form letter management module. This module may enable a user to combine ad-hoc queries with custom Microsoft Word document templates to produce form letters, for example. Once an ad-hoc query is designed and saved in the reporting module, it may be used as a data source for a form letter. The planning system may generate a text tag for each field in the data source to be placed in the form letter. Users may then lay out the word document and place the field tags in the correct locations. Once the template is defined, the data source may be applied to the Word template. The end results may be the presentation of the form letters to the user in Word, preferably wherein the user may make modifications to the letters before the letters are printed. Once the ad-hoc query and a template has been defined, the two may be saved together as a form letter package, for example.

The planning system also may include a finance module. This module may include tracked and/or estimated expenses. This module may track expenses at, for example, a meeting level. For each expense record, the type of expense, the status of the expense, i.e. whether it is an estimate, whether it has been paid, whether it is pending review, etc., the estimated amount of the expense, the actual amount of the expense, any comments regarding the expense, and/or relevant check numbers and check dates, may be tracked.

Security access control **102***d* may authenticate a user. Users of the system may log into the system via a network portal and access the system through the protections of a user name and password, for example. In addition, the security module may provide access control once the user has been authenticated. Multiple levels of access control may be defined. For example, one level may be for system controllers and another may be for a client user. System controllers may have full access to the application to add, delete and update the data, and client users may have limited access.

An auditing function may additionally be provided. The planning system may track creations, reads, updates, additions, edits and deletions from the databases, in order to provide a history of changes for auditing. The audit log may grow very large, and thus may require periodic purging. The audit log may track systems usage and help to resolve issues regarding data quality. Each audit record may be corresponded to a field in the person or place database or in the data captured, and may include a user ID and the date and time of any modification made, along with the new value for the field.

In particular, the present invention may provide a web-based meeting setup interface, as shown in FIG. **2**. Upon selecting a button as in FIG. **2**, such as Programs, Speakers, Topics, Reports, Profile, Documents, or Help, for example, the browser may be directed to one of the many interfaces described hereinbelow. Meeting information may be pre-

sented in categories, such as on a left menu or a top menu as shown in FIG. **2**. According to an aspect of the present invention, a wizard with reference links may be provided, such as on the left portion of the display. Such a links system may provide a user with the ability to quickly link to other portions and pages of the system for ease of navigation. As may be seen in FIG. **3**, the left menu may provide access to program details, budget information, expense details, attendance roster, print invitations and evaluate, for example. A screen for budget information is displayed in FIG. **3**, expense details displayed in FIG. **4**, attendance displayed in FIG. **5**, invitations displayed in FIG. **6**, and evaluations in FIG. **7**, for example. Additionally searching may be performed using the interface depicted in FIG. **8**, for example. Such searching may be based on name, venue, meeting code, status, or speaker, by way of non-limiting example only.

Upon selecting Programs, for example, the interface may be directed to the My Programs page seen in FIG. **9**. In FIG. **9** there is shown a screen shot displaying information regarding program status. Information such as Pending Request, Request Submitted for Approval, Request Approved, Request Denied, In Progress, Set-up Complete, Completed, Reconciled, Postponed, Cancelled and Programs Requiring Evaluation may be displayed. A count associated with each category may also be provided. Such a count itemizes the number of programs with the associated status. Upon clicking on the Pending Request hyperlink, the pending request screen of FIG. **10** may be displayed. This screen may include programs of the particular status in the territory of the user, or the user entered territory, to be displayed. If the Request Submitted for Approval hyperlink is instead selected, the screen shot of FIG. **11** may be displayed. Similarly, the hyperlink for Request Approved may be selected, which may direct to the screen shot of FIG. **12**.

For example, as may be seen in FIG. **13**, a click of Request Denied may show a table of requested meetings and the associated information for any meeting with an attendance denied by a supervisor when an approval was requested, such as by an alert request. Similarly, in FIG. **14**, meetings in progress may be displayed. In FIGS. **15** and **16** there is shown a set-up complete and completed screen shot, respectively. Meetings and meeting attendance may also be reconciled, as may be seen in FIG. **17**. In FIGS. **18** and **19**, there are shown hyperlinks of postponed and cancelled meetings. Additionally, programs may require evaluation, as may be seen in FIG. **20**. Programs may also be requested, as may be seen in FIGS. **21**A and **21**B.

The present invention may further provide a system wherein a user may create a program in the database. According to an aspect of the present invention, a meeting may be scheduled and all services included with the meeting may be requested during scheduling. For example, an audience may be selected and payment may be made, as well as other services known to those possessing an ordinary skill in the pertinent arts. Similarly, this service scheduling may be expanded to client level, such that a series of meetings may be scheduled by a client, such as a hospital or doctor, for example, and services may be consolidated as discussed hereinabove with respect to a single meeting planning.

In scheduling a meeting, the client may prioritize the specifics of a given meeting such that weight may be allotted to various preferences. In this way, a client may be able to select a preferred date, speaker, venue speakers, dollars spent, room specifics, and other specifics known to those possessing an ordinary skill in the pertinent arts, for example, and the system of the present invention may weight each choice such as to accommodate as many preferences as possible while still meeting the client's meeting requirement and preferences. For example, the client may wish to have the best audio visual equipment for a given cost, such as $500. Venue information may be included in the database, and may contain information such as the shape of the room such as, u-shaped, for example, and an ability to provide or setup a registration table, which factors of the meeting location may affect available or acceptable options related to the meeting, such as particular types of A/V, or time frame for registration, for example. Additionally, the present invention may provide a level of approval after a meeting is created, whereby a manager or designated individual may be alerted to return to the database and accept or reject a meeting. This approval level may provide an additional level to check available or acceptable meeting options, for example. Such an approval may occur as described hereinbelow with respect to alerts.

FIG. **22** represents an exemplary database, which may be, or be within, for example, a person and/or place table. The person and place table may provide a common store for any representative, speaker, moderator, attendee, audio/visual equipment or provider, and/or venue data, for example. Providing references to people and places in a single table may provide a consistent, normalized view of the data, and may provide a common access point for critical stores of information. Each person and/or place may be stored in the person and place table/database, thereby providing a common value for all sub-systems. This common-valuing may allow analysis of speaker and attendance data across clients, brands and/or projects.

The person and place database may include the contact information, i.e. the addresses and phone numbers, of all people in and involved in a project or projects. The person and place database may abstract this contact information to provide a consistent interface for accessing the information. For example, an address for a speaker, and an address for a venue, may be stored in the predetermined table having a given structure for the particular project or meeting. This predetermined table, or given structure, may vary by client, or by project, or by meeting, for example. Each address for a person or place may be labeled with a type, such as business, home, shipping, etc. For each address, the person and place database may store street, city, name, zip code and comment data. One address for each person or place may be flagged as a correspondence or mailing or shipping address, such as for any automated form letters that may be produced as discussed hereinabove. Thus, the form letter module and the databases(s) may preferably be communicatively linked for automatic address generation for form letters, for example. Phone numbers may also be labeled by type, i.e. business, home, mobile etc., such as for automated phone dialing upon linkage to a phone system. Each phone record may contain a phone number, extension, comments, and a type, for example. The person and place note facility may provide an interface to enter free form text notes, that will be date and time stamped and linked to a person or a place. These notes may then be freely available, or available in accordance with a given security clearance, elsewhere in the planning system. These notes may be, or be used by, non-structured data that does not have a pre-specified field in the person and place database, or may be structured data for relational storage in a database, for example.

In operation, a user may log-in, and that log-in may alert the planning system as to the functions, projects, or meetings, to which that user may be granted access, and, if access is granted, to what level access may be exerted. Once connected and authenticated, the planning system may offer the user a menu of available choices. FIG. **23** is an embodiment of the

menu options. An application may be selected **302** using a selector **303**, such as a drop-down menu, for example. If a meeting planner is selected **302** as the application, the user may enter a client name **304**, a brand name **306**, and/or a project name **308**. Once these parameters are entered, a continue button **310** may be depressed and a new screen as shown in FIG. **24** may appear.

FIG. **24** is an embodiment of a screen after login. The screen may be used to navigate, such as via navigation buttons on the top of the displayed window **402**, such as a tool bar. If a new meeting is to be added, the Add Meeting button **404** may be depressed, for example.

Requests for the addition of meetings may occur through a network or web-based system, and may be completed by a system user, or an account supervisor, for example. Alternate methods of adding meetings may also be utilized. In an embodiment of the present invention, a meeting may be added using the screenshot of FIG. **25**. In particular, a meeting type and topic may be chosen. Budgets may be assigned, as well as representatives designated, as may be seen in FIG. **26**. The numbers of attendees, audience, and targeted medical professionals, for example, may be entered as shown in FIG. **27**. In addition, driving factors may be designated, such as speaker, date or location. Such driving factors may be tiered into primary, secondary, or tertiary, for example. Such driving factors may be seen in FIG. **28**.

Speaker information may be designated, as in FIG. **29**, as well as dates and times in FIG. **30**, and venue and contact information in FIG. **31**. The meeting designer may also configure additional venues utilizing the screen shown in FIG. **32**, and audio/visual requirements utilizing the screen shown in FIG. **33**, for example. The present invention may display, as shown in FIG. **34**, program cost and general notes related to the meeting, which notes may be added using the screen of FIG. **35**. After configuring the meeting, a "summary/submit" display may be provided as in FIG. **36**. While meetings await appropriate approval, these meetings may be accessed using the screen shot shown in FIG. **49**. If a meeting meets appropriate approval, the approver may access the program details using the screen depicted in FIG. **50**. The approver may thereby review the entered meeting and approve/reject the meeting.

Alternatively, the user or account supervisor may be asked to enter a meeting code **406**. Meeting codes may be determined by the account supervisor, and may contain a client's sales territory or district number, or may be automatically generated by the planning system upon generation of a meeting, for example. Meeting codes may be entered by typing directly into the meeting code box **406**, or by a drop down selection from the code box **406**, for example. Pull-down **408** may allow the user to select a status for the meeting. If the user does not assign a status, the status may self assign, such as "No Request". A meeting may be considered "Set-Up In Progress", for example, until all meeting details have been completed. Once the program is confirmed and all details have been arranged, the program may have status "Set-up Complete".

In order to complete meeting setup, a plurality of meeting information, such as meeting date and meeting time, may be entered. For example, to set up a meeting date, a calendar icon **410** may be used. The user may click on the calendar and then click on the date that has been selected. A meeting time may be assigned **412**, such as along with a corresponding pull-down to select A.M. or P.M. After entering the above information, the user may save the screen using button **414**, thereby allowing the user to move to the next screen, whereat the user may continue entering information about the meeting.

FIG. **37** is an exemplary embodiment of editing of meeting parameters. At any time after a meeting is entered, an authorized user may edit the information that was previously entered, such as by entering the "edit meeting" mode via the toolbar button **502**, for example. In addition, the user may use an edit meeting to add any information that was previously unavailable. The user may be encouraged to save any changes that were made. Certain of, or all, fields depicted in FIG. **24** may be edited, or selectable via drop down windows, for example.

Exemplary data fields to be entered in FIG. **37** may include the Date 7-Day Packet Sent **550** field, and/or the 7-Day Packet Tracking Number field **552**, wherein a corresponding FedEx tracking number may be entered. Also selected, such as by using the calendar icon, may be the Date Invitation Mailed **554** and the Date Attendance Roster Returned **556** fields, for example. In certain exemplary embodiments, the user may type freely in the corresponding space for meeting notes **556**, and via notes, or via a dedicated meeting email server listing, for example, the user may thereby communicate with other individuals interested in the meeting. For example, a message left in the meeting notes area may be read by other individuals with access to the meeting planner. A Feedback Report Returned status **560** may be automatically assigned as "no", unless an entrant uses the pull-down and selects "yes", for example. A Speaker Status **610** may be entered via a pull-down throughout the meeting planning process to assign a speaker status. If the meeting date has not been confirmed with the speaker, the speaker may be "pending". If the date has been confirmed, the speaker status may be "confirmed". Speaker Travel **612** may be recorded via, for example, a pull-down to assign personnel to handle the speaker's travel arrangements. A speaker may be confirmed **614** by using a pull-down for the appropriate method of confirmation, such as a phone conversation, fax, e-mail, etc. A date that the speaker was confirmed **616** may be entered via the calendar icon, for example. Speaker Notes may be typed freely in the corresponding space for speaker notes **618**, for example.

A contract status field may be automatically populated, such as with "Initial Request". When the user changes the status to "Contracted", the screen may change to show more venue details. A venue may be considered contracted when a received and/or signed meeting confirmation from the venue is obtained, and a date contract returned field may be populated on the date of receipt of a received and/or signed contract from the venue.

Returning now to FIG. **37**, the Meeting Type **504** may be selected from the pull-down options and may identify the business type of the meeting. The meeting format **506** may be selected from the pull-down options and may indicate the format of the meeting, such as a dinner, breakfast, or lunch meal type, a conference, seminar, or other meeting type. Meeting topic **508** may be selected from the pull-down options and may be related to one of the products, or areas of research, or any other activity that a business entity may engage. Note that a meeting type, format and topic selections may be pre-defined by an account supervisor at the start of a project.

A Date Request Received **510** may be entered, such as using the calendar icon, to record the date that the meeting request was received, such as in order to assist the user in determining the amount of time it has taken to complete the meeting set-up. A host may be added in the add new host field **512**. To add a host, the user may click on the Add New icon,

and/or may search an underlying host database to find a host, or may add a host to the database so as to allow for selection of that host from the database. Of additional note, a user may perform a realistic search, which may automatically reject nonsensical searches, and which may include wildcards, for any field in use in the present invention. If no results are found for the search, the user may add, and then select, the desired search person, place, or entity. Thereby, the present invention provides a universal, one touch (or click), search function, followed by a one-touch change, add, or select function. If a name is already entered and the user wants to change it, the user may first delete the entered name by clicking on the X next to the appropriate field, for example. The Host Voicemail **514** may automatically populate the host's voicemail extension when that information is added into the host profile, for example. The target list included **522** may utilize the pull-down to select "yes" if the meeting host has included a target list with his/her meeting request. If this information is not updated, the system may automatically assign as "no".

The Adding Additional Point Person, which is, in one embodiment, a coworker of the client named as the "point person", may serve as an additional point of contact. The additional point person may serve as a default cc: to assist the point person. The Additional Point person may be added to the meeting in the same fashion as set forth hereinabove. The contact **518** may be an employee or contractor of the host, responsible for confirming the meeting logistics. Contacts may be added to the meeting in the same fashion as the host. Of note, all persons may be added to a meeting using the single touch search, and the single touch add, select, or change, as discussed hereinabove. A moderator **520** may be, for example, a speaker that is employed by the customer. Within the moderator field box, the user may have the option to select or delete the current moderator. The moderator may be added to the meeting in the same fashion as the host. The territory number **524** may utilize a pull-down to select the appropriate number, which may have been preloaded by a system administrator. The contract location description field **526** may utilize the pull-down to select the appropriate description.

As discussed hereinabove, FIG. **38** is an exemplary embodiment of the present invention. The speaker field **602** may contain the name of the speaker for a program. The speaker may be, for example, a visiting faculty member, or other client employee or contractor, that has been trained by a client to speak on behalf of the client. The speaker may be added to the meeting in a similar manner to the host. The business unit field **604** may utilize a pull-down menu selection. The geography field **606** may utilize a pull-down to assign the correct location of the business unit involved. The venue field, such as that at which the speaker will speak, may be the location in which a meeting will take place, such as a restaurant, hospital, hotel, etc. Once a reservation has been made, the venue may be marked "reserved" in the system.

A target list may be included with a meeting request, and each target may be entered in the "Participant" section of the meeting planner. For example, if the meeting was a conference of medical specialists, a target list may be a list of medical personnel that a meeting host might like invited to the program. To enter a target list, the user may select a meeting to affiliate with the target list. At the top of the meeting select screen, for example, the user may go to the participant section. To add a New Participant the user may click on an "Add New Participant" button located, for example, in the top right hand corner. An icon may be used to indicate the function, such as, for example, a red plus symbol. Depressing the icon may open a search screen, and the user may search for a target in the same fashion that a search for a host or speaker is performed. If the search is successful, the name and address may be added to the invitation list by depressing an "Add Participant" button. If the user's search is unsuccessful, the user may depress the "Add New" button and create a new profile for that target.

As a user is entering the target list, the system may prompt the user when a pre-determined participant limit is reached. In the case of entering a target list, a user may override the limit and continue entering names. Thus, a particular meeting may have a select number of participants ("Yes" responses) allowed to attend a program, and this limit may be shown at the top of the Participant Screen. There may also be notes in the Participant Notes section indicating a deviation from the limit listed at the top of the screen. Notes about participant limits may override a pre-determined participant limit. Participants may also be deleted. To remove a Participant, a user may click on a delete icon, such as, for example, an "X", and may thereby request the deletion function. The user may then be queried concerning the desire to actually delete.

A target list may, for example, be imported into a meeting. To import a list from an existing planner target group, such as a target list for a given district, territory, group name, or group attribute, the user may go to the meeting's participant screen. The user may then click the territory import, contract location import, or import group to begin import. The system may ask the user to confirm that the user wants to complete this import for this meeting to insure that the user has the desired meeting and group selected. If correct, the user may select "Submit". The planning system may then import all names affiliated with that territory/contract/group. For example, attendee lists may be downloaded in a comma separated value (csv) format. A downloaded attendee address list in a csv format file may then be found, for example, in the fulfillment module, as discussed further hereinbelow, such as in csv lists **706**, **708**. The file may be additionally be downloaded into an Excel csv file by choosing a file name from a menu that appears as "Save Target As".

If a meeting host wants to only invite specific people from the list previously imported, the user may choose the "mass select" function, for example. Mass Select may default to all names being a "do not invite". The user may then select those targets that the host does want to invite. Once the user selects and saves the names desired, and the names left as "no" may be removed from the list, thereby leaving only those names that selected as yes.

The present invention may allow for the inviting of guests to a meeting by assembling and entering responses to invitations (RSVPs). Invitations may provide the invitee with a fax back, or email back, request, ("fax back" response) for example. Once the invitee responds, the fax back or email back is considered a response or RSVP. Invitees may note on a fax whether or not they will be attending a program, and may provide some profile information with the RSVP, such as an address, phone, fax, Social Security number, or TaxID, for example.

If a fax back response is positive, the user may ensure that the information on the fax back form is reflected in the invitee's profile, i.e. medical suffix, address, phone, fax, SS# or TaxID. The user may then save the response by clicking on the "Edit" icon near the participant's name. The user may use a drop down box under attendance status to choose "Yes" to indicate the fax back RSVP was positive. If a guest count was requested on the fax back form, the user may enter the number indicated in the guest count field and send a fax or email confirmation, for example. A confirmation fax may be sent by the user by first selecting to send an e-fax, editing a reply, and

delivering the e-fax via electronic mail, for example. Once the e-fax is successful, the user may initial and date the RSVP and file it in an appropriate folder, for example. Optionally, the user may send a mail confirmation, which may be performed by printing the edited fax message, and printing the letter on letterhead for hand mailing.

If the fax back RSVP is negative, the user may ensure that the information on the fax back form is reflected in the invitee's profile, i.e., medical suffix, address, phone, fax, SS# or TaxID. The user may save the response by clicking on the "Edit" icon near the participant's name to provide editable fields. The user may then utilize the drop down box under attendance status and choose "No" to indicate a negative response. The user may then file the negative RSVP in an appropriate folder.

The user may be able to add, edit or search a profile to add to a list. When a user clicks on "Add New" button in meeting list, for example, a search box may appear. A user may use a wild card search when the user is uncertain of an exact spelling of an attendees or speaker's name, for example. The asterisk may represent the wild card and can be used as a prefix, suffix or both. For example, using the wild card as a suffix for Jon*, will result in a search for any combination of letters using "Jon" as the first 3 letters of the field searched. Jon, Jonah or Jonathan would all be exemplary possible outcomes for this wild card search. If the user knows the city or state for the person/place entry, the user may enter that information as well. Providing additional information may help reduce excess results to thereby produce a more efficient search.

If a search is successful, a listing may appear as a set of matches to a search. To make a selection, the corresponding "Edit and Add to Meeting" tab may be selected. A profile of the individual may appear upon selection to allow the user to verify that that the individual and all of the relevant information is accurate. At any point in the process the user may use the "back" button at the top of the page to bring the user back to the search screen to, for example, create another search selection.

If the record that the user is seeking does not appear in the search results, a user may utilize the "Add New" button. When the user selects add new, a blank profile screen may appear. The user may enter all appropriate information, such as name, address, phone, fax, and the like, and may save. The user may then select the "add to meeting" button by using the icon at the top of the profile screen, for example.

The present invention may be utilized to print invitations to a meeting attendee. Generally, printed invitations may be sent, for example, about 4 weeks before a program date. The invitations may be generated from the "Fulfillment" module in the planning system. FIG. **39** embraces one embodiment of the invention showing a the fulfillment tool bar button **702**. A user may print and send such an invitation by choosing the meeting desired, such as by selecting the correct meeting code from the drop down list provided in the fulfillment section. For example, a custom invitation may be sent by selecting the appropriate drop down menu selection **704**. Invitations may then be printed on designated letterhead.

Reminder, or other, faxes may be sent through the use of the present invention, in accordance with a manual trigger, or an automatic trigger. An automatic trigger may be, for example, time triggered or event triggered. A time trigger may be automatically generated on a certain date, or at a certain time. An event trigger may be an event, such as a change in meeting time, completion of a setup, etc. These triggers may be automatically entered to the system, and the system then tracks until the event occurs, and, upon occurrence of the event, the faxes (including emails or telephone calls) are automatically generated. Events, or time, triggers may trigger faxes only to persons having a certain status for a given meeting in the database. For example, the event "setup complete" may trigger an event fax to the meeting host. Alternatively, for example, on a specific day, such as, for example, a Monday, an account coordinator, or an automated message generator operating on a triggered basis, may send reminders, cancellations, postponements, attendance rosters, confirmations, invitations, or other document templates that are populated by merging information from a database for manual or automated distribution, by fax, email, automated telephone call, or the like, to participants, speakers, host, additional point persons, speakers, audio/visual suppliers, or the meeting attendees, for example, such as for the meetings coming up that week. If a meeting is occurring over the weekend or on a Monday or Tuesday, the present invention may send the reminder faxes or emails Thursday or Friday, for example. In addition, reminder faxes can be e-faxed from the computer in the same fashion as confirmation faxes, for example. An automatically generated fax, email, or the like, may be autofilled from the information in the database, such as by an automated merge, such as by autofilling the fax number, name, position, and/or status (host, attendee, etc.) in accordance with a given event or time.

As may be seen in FIG. **40**, alerts may be generated as events occur within the planner. Alerts may take the form of a notification or a prompt. For example, the system may send an email to a service requester when status elements of a meeting change, such as when a speaker is booked, or when a conference location is booked, for example. The system of the present invention may provide for a database of alerts, such that a record of the alerts sent and received may be reviewed and reported.

The system of the present invention may keep records of alerts, as may be seen in FIG. **40**, and such records may be reviewable. Alerts may also be utilized to remind participants of a meeting to return, for example, a website to rate or evaluate a meeting. In this way, the system of the present invention may track performance of a meeting based on any of a myriad of information within the system, such as speaker, meeting location and meeting topic, for example. According to an aspect of the present invention, the system may send an alert, in the form of an email, for example, to a representative inviting the representative to return after the meeting to evaluate the meeting, and may thereby accordingly track performance of meetings or speakers.

In addition, the system of the present invention may display programs allocations, as may be seen in FIG. **41**. Different types of programs may be displayed, and the categorization of each may occur, such as allocated, in progress, completed, and still available, for example. Similarly, budget allocations may be tracked and presented as shown in FIG. **42**. Such presentation may provide a summary of allocated regions and totals for each, for example.

Other program allocations may also be highlighted according to an aspect of the present invention. Such other programs may be displayed as shown in FIG. **43**. For example, a meeting program may be chosen and a topic selected. Other individuals may be added to the program, such as for cost sharing, such as a partner to chare costs. Further, the present invention may provide a mechanism to target an audience specifically with one or more programs, such as a family practice in a particular location. Programs may be found and selected by searching, such as for venue or zip code, for example. Speaker attendance at a meeting may also be tracked in accordance with one or more programs, such as speaker training, for

example. Such a speaker training tracking may be displayed as shown in FIG. **44**, for example.

The present invention may also provide for searching based on speaker. As may be seen in FIG. **45**, there is shown a screen shot of a speaker search according to an aspect of the present invention. Such a search may be based on the type of speaker, specialty or topic, or may be based on the name or location of the speaker, for example.

According to an aspect of the present invention, consulting contracts may be attached and provide access, such as by using links or other method known to those possessing an ordinary skill in the pertinent arts. Such consulting contracts may, for example, include records of investigators, and/or research, speaker, or general consulting. Such agreements may be scanned in and attached to the record of the speaker, such as a doctor. According to an aspect of the present invention, this system of attaching contracts and speaker resumes may be accessed via an icon. Other information, as may be realized by those possessing an ordinary skill in the pertinent arts, may also be incorporated into the present invention in a similar manner.

The present invention may contain a database of approved speakers and venues. Other venues and speakers may be added to the database by nomination, for example. Further, a database of approved topics may be included in the system. Approved topics may be included, as illustrated in screen shot of FIG. **46**. Approved topics may approved by a system administrator.

After a meeting has occurred, the user may wish to record return rosters to thereby provide a listing of each person who actually attended the meeting. Upon receipt of a return roster, the user may click "Edit" in the invitee's record in the Participant Screen, and click "Yes" in the actual attended section of the record, for example. The user may save that information and enter the roster return date on the meeting information screen.

Expenses for a meeting may additionally be tracked through the use of the present invention. The user may perform this function by opening the project, clicking on the financial button, choosing "Expense Register", clicking "Add New Expense", selecting the meeting code, and selecting the charge type (i.e., venue, outside AV . . .) or by entering the Expense Type (Visa), or the expense category (F&B, Room Deposit . . .), or by entering the charge amount, such as including a decimal (100.00), and/or by entering any notes pertinent to the charge. The user may save this information for permanent record keeping.

FIG. **47** is an embodiment of a screen after login. A tool may be chosen at **802**. A client may be chosen in **804**. An existing brand or product that is the subject matter of the meeting may be chosen in **806**. An existing or new project for the meeting may be chosen in **808**. In the example of FIG. **47**, a meeting planner was chosen, the client is Pfizer, the brand name is Glucotrol®, a product of Pfizer®, and the project is a dinner meeting entitled 2001 Dialog Dinner Meeting.

FIG. **48** is an embodiment resulting from depressing the edit meeting button **902**. FIG. **48** is a list of all meetings for the Glucotrol® 2001 Dialog Dinner Meetings. Various meeting codes **904** are displayed for the meetings displayed on the FIG. **48** meeting list. Each meeting may have an individual code which specifically identifies it. The date and scheduled time for the meeting **906** may also be listed for each meeting code. The status of the meeting may also be shown **908** as being either completed, canceled or in set-up, for example. The host of the meeting **910** is listed as an individual who is sponsoring the meeting. The moderator **914** is also listed for each meeting. A first, second and third speaker **916** may also be listed for each meeting. The meeting location **918** may be provided as a city or state, and venue **920** provides the specific business location for the meeting. The audiovisual **922** allows the company providing audiovisual services to be listed. The exemplary overall listing of FIG. **48** may provide a user with a single page snapshot of all meetings for a given product. Each individual meeting code **904** of FIG. **48** may represent a hyperlink to additional information for that meeting. For example, the hyperlink for meeting code GLX-F3F-3, **924** may bring the user to a display, such as that shown in FIG. **51**.

FIG. **51***a* is an embodiment showing details of the meeting designated by the meeting code GLX-F3F-3. The meeting code is shown **1002** in FIG. **51***a*, as is the meeting status **1004** and the meeting type **1006**. The meeting date is provided in a field **1008**, and additional information indicating the format of the meeting **1010** is provided. In the example provided in FIG. **51***a*, the meeting topic is indicated as a meeting discussing type 2 diabetes in **1012**, and the meeting time is indicated as 7:00 p.m. on **1014**. The date the request for the meeting was received is also indicated in the display **1016**, as is the host of the meeting **1018**. Note that the host name is a hyperlink to a profile of that person. An organizer contact is provided in **1022**, and additional point persons may be added, as well as a moderator **1026**. Should a target list be included, its presence would be indicated by a flag in the field on the display **1028**. The date that the seven day packet report was sent, as well as the date any invitations were mailed, are indicated in fields **1030**, **1032** respectively. If the seven day package has a tracking number, it may be indicated on the display **1034**. If edits to the attendant's roster were returned to the host, that may be indicated in field **1036**, as well as any feed back report returned in field **1038**. The host can also track the number of gift certificates requested in a field provided on the display **1040**.

The present invention may display meeting notes to those hosting, organizing and attending the meeting **1042**, thereby allowing meeting planners to exchange ideas and information so that the best ideas and resources of the meeting planners are utilized. A territory number **1044** and a contract location description **1046** may be available as drop down menus and may be pre-determined by a system administrator. Speaker information may be provided by utilizing an icon button for adding additional information **1048**. A speaker's name may appear as a hyperlink **1050**, if a speaker is listed. The hyperlink may provide a profile of the speaker so that additional information may be gained by those who have access to the system. The status of the speaker, such as confirmed or unconfirmed, may also be presented **1052**, and the method of confirmation **1056** as well as the date of confirmation for the speaker **1058** may also be provided. To assure that the speaker has adequate transportation, speaker travel organizer **1054** may also be provided so that a speaker itinerary can be verified and included in the information offering to a host, organizer, speaker, or the like. FIG. **51***b* continues the display shown in FIG. **51***a*. The display shown on FIG. **51***b* may include speaker notes that can be used to record communication with, or to contact or communicate ideas to, the speaker, such as wherein the speaker may have access to other members who are involved in meeting planning. Speaker notes **1060** may include contact or travel information, speaker topic information, financial information or qualifications relating to the speaker. The present invention may include browser-based review of notes, or attachments, for a meeting, or for a person related to a given meeting, such as attachments related to a speaker, such as a curriculum vitae, or to an audio visual supplier, such as a copy of the available equipment. Thereby, browser based attachments may be associated with any per-

son, entity, or place within a database, and may be available to all users accessing a meeting involving that person, entity, or place, or to an authorized group of users accessing that meeting.

In an embodiment shown in FIG. **51***b*, the business unit or geography, as well as budget categories, may be displayed **1062**, **1064**. Details may be displayed on the same, or an associated, page by, for example, using a scroll down control bar. A toolbar **1066** may be used to insert hyperlinks to jump back to the top of the page, to the travel portion, to the participant listing, to the financial summary, or to request changes, for example. The name of the venue **1068** may also be a hyperlink to provide a profile for a venue. The exemplary display of FIG. **51***b* provides a venue address **1070**, phone number **1072**, fax number **1074** and a contact at the venue **1076**. The meeting room may be displayed **1078**, as may be the contract status **1080**, such as whether the contract has been signed for this specific date, and/or the time that the room at the venue is accessible **1081**. The date that the reservation was made **1082** and the total capacity of the venue **1084** may also be displayed. The capacity of the venue may limit the total number of invitees to the meeting, and a venue may be recorded in a memory as being so limited. The date a venue has been supplied a credit card as a means of payment for the event may be provided as an in-date form in the display field **1086**, for example. The cost per person **1088**, the date of the contract for the venue **1090** and the venue cost **1092** may also be displayed. The date the contract was returned after being signed by the venue holder **1094**, and a method of payment **1096**, may also be indicated. The audiovisual supplier for, for example, audiovisual aids, may be provided in **1098**. The audiovisual supplier's name may be a hyperlink to a profile for that supplier, and may be displayed **1001**. The audiovisual contact name **1003** and the supplier's city and state **1005** and phone number **1007** and fax **1009** may be displayed. Venue notes which indicate relevant information may be placed in a text field provided in display **1011** of FIG. **51***b*. Until a venue is contracted, alternate venues also available may be displayed in FIG. **51***c*. If the meeting may occur in multiple locations, a second venue **1013** or a third venue **1015** may be provided in details with respect to those venues. Travel information may be added or edited, and entry of such may be accomplished via pushbutton **1017**, for example.

Returning to FIG. **48**, if the profile edit button **924** is depressed, the display of FIG. **52** may be provided. FIG. **52** is an embodiment of a profile search that allows a profile edit after a search of a person **1104**, venue **1103**, or AV supplier **1102**. A search may prioritize search results in accordance with an affiliation to people or entities. If the user selects radio button **1104** to search for a person, the display of FIG. **53** may be presented to the user. In the embodiment shown in FIG. **53**, the search for a person may be completed by typing in the last name of the individual **1202**. It is noted that different versions of the same person may exist with respect to different clients within the database. Additional information may include first name **1204**, city **1206**, state **1208** and zip code **1210**. Additional search options for locating a person during a search may include client project **1212**, a person type, such as speaker, moderator, target, host, or any of the above **1214**. The search may be initiated by depressing search button **1216**, and a new search with clear fields may be acquired by depressing the clear all button **1218**, for example. Also indicated in FIG. **53** are search results from a person search indicating name, the person-type, the city, state, and zip code, in a search results line **1220**. Should any of the information be incorrect or subject to change or updating, the profile may be edited by depressing the hyperlink **1222**, for example. If a new person record needs to be added to the database, the add new button **1224** may be used to add a new person to the profile database.

It is an aspect of the current invention that meeting data may be organized for effective use without viewing multiple screens. The structured reports provided by the current invention provide significant utility to the meeting planning process by informing meeting planners of various and multiple aspects of the current project. These combined aspects of the planning activity may be assembled into standardized reports.

Reports may be accessed using the toolbar shown in FIG. **54**. The reports button **1302** may display the report menu **1304** for the selected project. Selected reports may include multi-day reports, such as, for example, a two day report, five day report, seven day report, weekly roster report, invitation report, status summary report, AS report, result report, cumulative attendance report, cumulative target report, speaker report, speaker request and/or a financial report. The report types may be hyperlinks, and selecting any of the hyperlinks may bring up the report page. For example, selecting the two day report **1304***a* may bring up the page display in FIG. **55**.

FIG. **55** is an exemplary menu to access a two day report. The user may enter a report starting date **1402** and depress the continue button **1404**. Alternately, the user may depress the calendar icon **1406** to bring up a calendar display, as shown in FIG. **56**. The calendar display of FIG. **56** may allow the user to select a date to initiate a two day report. For example, if the user selects February 14 within the FIG. **56** calendar, the display of FIG. **57** may be provided.

The system of the present invention may also generate a number of reports. As was discussed hereinabove, a myriad of variables may be thereby tracked. Thus, reports may be generated based on any of these variables. Several of the reports may be seen in the screen shot of FIG. **58**. Each type of report may be available via a hyperlink access from a relevant heading. Reports may be generated based on Program Costs, Program Summary, Budget Summary, Detailed Program Costs, Attendance Summary, Evaluation Summary, Contract List, Speaker Honoraria, Field Sales, Marketing Financial, and Login Summary, for example.

Referring now to FIG. **59**, there is shown a screen shot according to an aspect of the present invention, showing a sample program costs report. As may be seen, the expenses are identified with regard to a speaker, consultant or topic. Referring now to FIG. **60**, there is shown a program summary report identifying the CME, representative, grand rounds, promotional and CSC. Referring now to FIG. **61**, there is shown a budget summary report identifying budget, estimated costs, actual to date costs and remaining budget based on any grouping, including representative, territory or other, as may be realized by those possessing an ordinary skill in the pertinent arts. According to an aspect of the present invention, the remaining budget for a project or meeting may be estimated based on the interred budget and amount dispersed to date.

Referring now to FIG. **62**, there is shown an attendance summary report according to an aspect of the present invention. As may be seen in FIG. **62**, the number of attendees, the territory and other information may be displayed in the report. FIG. **63** shows a screen shot of the program evaluation summary report of FIG. **58**. As may be seen in FIG. **63**, various feedback may be collected regarding programs including speaker qualities, topic qualities, meeting and facility qualities, as well as other feedback associated with the event which may be collected, as may be apparent to those possessing an ordinary skill in the pertinent arts. Further, FIG. **64** shows a contract list report print screen. As may be seen in FIG. **64**, the information pertaining to a contract may be displayed, such as

territory, type, initiation date, expiration date, status, and other information pertaining to the consultant. Other information may be included as would be apparent to those possessing an ordinary skill in the pertinent arts. A screen shot of a speaker honoraria report is shown in FIG. **65**. As may be seen in FIG. **65**, a speaker with the speaker's associated identifying information may be logged with the accumulated honoraria and speaking engagement information. Further reports may include a field sales report, a screen shot of which is shown in FIG. **66**. A may be seen in FIG. **66**, a tabulation of sales for a given field representative may be displayed and may be accumulated within a temporally appropriate designation, as desired.

Market financial summaries may also be included according to an aspect of the present invention. For example, as may be seen in FIG. **67**, a market financial summary report may include type of event, topic information, pass through dollar for completed events, expenses for completed events and similar categories for pending events. Other information may be included, as may be evident to those possessing an ordinary skill in the pertinent arts. A login summary report may also be included. As may be seen in FIG. **68**, there is shown a screen shot of a login summary report according to an aspect of the present invention. As may be seen in FIG. **68**, territory information, along with login name, last login date, and login count, may be tabulated. Other information may also be included as associated with a login identity, as may be apparent to those possessing an ordinary skill in the pertinent arts.

FIG. **57** displays a screenshot of a dialog dinner meeting two day report for a reporting period ending Feb. 14, 2002, and displays the basic information concerning a project identified by a session code, date, time, location, and host, and displays the number of current and actual reservations and attendance **1604**. FIG. **57** indicates the session code of the meeting, which may also be a hyperlink to allow a user to further investigate this particular meeting. The date and time **1604***b*, **1604***c* may be the date and time that the report for the indicated event was run.

Returning to FIG. **54**, should the hyperlink for a seven day report **1304***c* be selected, the report shown in FIG. **69** may be displayed to the user. The report indicates that two session codes may have available seven day reports **1704**, **1702**. Also indicated are the date whereon the seven day packages were sent to those interested in receiving reports.

Should the summary status report **1304***f* be selected, the hyperlink may provide the page shown in FIG. **70**. FIG. **70** displays an embodiment of the current invention that may be used to provide a summary status report for a user. The status report may indicate the general status **1802**, as well as a count **1804** for all individual meetings under a certain product project. As shown in the example of FIG. **70**, the list can be extensive, covering a total of **133** different meetings associated with business projects. The summary status report may indicate a session code **1806**, date and time of the meeting **1808**, the location of the project meeting **1810**, the host and the host's extension **1812**, **1814**, as well as any additional host **1816**. A moderator is shown in the table **1818**, and a first, second and third speaker may be displayed **1820**. The topic of the meeting may be shown in field **1822**, as well as the current reservation, total number of current reservation **1824**, and the actual attendance of a completed meeting **1826**. The overall status of the meeting may be provided in **1818**.

Returning to FIG. **54**, the hyperlink **1304***d*, weekly roster report, is selected. A display similar to that of FIG. **71** may be displayed. FIG. **71** displays a weekly roster report for all of the session code projects available under a particular product. A roster report may include the current reservations as well as the actual attendance at the various meetings associated with the project.

Returning to FIG. **54**, the user may invoke an invitation report **1304***e* by selecting the associated hyperlink. As a result, a display as shown in FIG. **72** may be presented to the user. FIG. **52** represents an invitation report. The invitation report may include a project session code for each meeting **2002**, the associated meeting time and date **2004**, the location name of the meeting **2006**, the host name **2008**, the date the invitation was mailed **2010**, the number of invitations actually mailed **2012**, the number of acceptances from that invitation **2014**, the actual attendance of the meeting **2016**, if the meeting has already transpired, whether or not the roster has been returned and the date of return **2018**, and the meeting status, such as either completed, set-up or canceled **2020**. The invitation report of FIG. **72** allows a comprehensive single page view of all of the meetings scheduled within a business product line, and allows the user to inspect the number and status of all invitations.

Returning to FIG. **54**, if the user selects a results report **1304***h* hyperlink, the display in FIG. **73** may be provided. FIG. **73** is a results report that provides cumulative statistics on a particular program or series of meetings. The report is a results report **2102**, and statistics for the multiple events or meetings are provided in the display in **2104**. Provided in the body of the results report may be the individual projects session code **2106**, the date of the meeting **2108**, a host or additional point person **2110**, the number of invitations mailed **2112**, the number of RSVPs received **2114**, and the actual attendance of the meeting **2116**.

Returning to FIG. **54**, if the user selects the Account Supervisor ("AS") report hyperlink **1304***g*, a display as shown in FIG. **74** may be displayed to the user. FIG. **74** is an embodiment of an AS report. The AS report may include the meeting code **2202**, the meeting time and date **2204**, the meeting status **2206**, speaker status **2208**, the date the request was received **2210**, the date the speaker was confirmed **2212**, the date the contract for the speaker was returned **2214**, the date the invitations for the meeting were mailed **2216**, the date a seven day report was sent **2218**, and the date that the roster was retained **2220**.

It is an aspect of the present invention that a financial report concerning a particular program or series of meetings may be generated for a user. An embodiment of a financial report is provided in FIG. **75**. FIG. **75** illustrates a screen shot of a financial report wherein only a portion of all the financial topics is visible **2302**. Table 1 lists exemplary titles for financial perimeters associated with the meeting that may be detected in FIG. **75**. The financial report may display the Table 1 parameters for each individual meeting project, for example, and may total the amount to provide the user an estimate of meeting costs and expenses.

TABLE 1

Financial Report Headings	
meeting code	speaker airfare
meeting date	speaker car
business unit	venue deposit
Geography	District business manager expense
meeting type	freelancer fees
meeting format	grant request
Host	management fee
Miscellaneous	Hotel
attendee honorarium	car

TABLE 1-continued

Financial Report Headings	
speaker air fare	on-site staff fees
speaker expenses	on-site staff expenses
speaker honorarium	supplies
Entertainment	postage and attendee expenses
venue room fees	
outside audiovisual fees	
F & B fees	
venue deposit	
speaker honorarium	

Reports may also be presented as shown in FIGS. **76** and **77**. In FIG. **76**, there is shown a program costs screen shot, which may set forth the costs associated with a given program. In FIG. **77**, there is shown a report of representative agreements received. As may be seen in FIG. **77**, itemization of representatives and a representative agreement received may be tabulated.

FIG. **78** illustrates an embodiment of the present invention in which the user selects the fulfillment menu button **2042** and selects from the drop down menu **2404** a meeting in which letter or e-mail correspondence needs to be generated. FIG. **79** illustrates fulfillment items for a particular project. These fulfillment items may include such meeting-specific items, for example, as a comma separated value file **2502**, an attendee separated value file **2504**, a venue confirmation **2506**, a cover memo **2508**, a cancellation fax **2510**, a cancellation notice **2512**, an invitation **2514**, a speaker confirmation **2516** and **2518**, an invitation **2520**, a thank you letter for a local speaker **2522**, a national single speaker thank you letter **2524**, a reminder fax **2526**, and/or an request for receipt **2528**. The user may use fulfillment items to simplify and efficiently develop correspondence necessary to execute plans for the meeting or project, or to communicate with persons affiliated with an event or series of events, such as speakers, attendees, venues, A/V suppliers, and/or hosts.

In an exemplary operational embodiment, the planning system may be divided into clients, wherein each client may log in individually, and within each client may be present, for example, one or more brands related to that client, or one or more projects related to that client, or related to a particular brand of that client, for example, as discussed hereinabove, and as illustrated in the flow diagram of FIG. **80**. Thus, upon logging in **2602**, a user may be able to, for example, set up a new client or subclient, or select an existing client **2604**, wherein a particular user may log into multiple clients within the planning system. Following selection of a client **2604**, a user of the planning system may be able to, for example, set up a new brand **2606**, or select an existing brand **2607**, or set up a new project **2608**, or select an existing project **2609**.

A project may include, for example, at least one meeting which may be selected as all, or a portion, of that particular project. Upon selection of a project **2608**, or a meeting, or upon selection to set up a new project or meeting, the user may be presented with an add/edit meeting selector. The user may add or edit a meeting through this selector **2610**, or, in an alternative embodiment, a meeting may be automatically added or selected in accordance with, for example, a received e-mail, a received telephone call, or a received fax. The add/edit meeting module may allow a user to track and/or modify a meeting in accordance with a meeting status, for example. The add/edit meeting module may allow, for example, a comprehensive review of the meeting, a review of meeting status, a comprehensive venue status, a comprehensive audio visual status and/or a target attendee status review, as discussed hereinabove. Each of these portions of the module may be selectable, such as using a hyperlink, and, upon selection, may evidence varying levels of detail within that portion of the module.

For example, each meeting may be keyed by a meeting code, and each meeting may have a meeting status. The meeting status may be, for example, in progress, set up complete, completed, postponed, not requested, cancelled, or planned but no date supplied, for example. The add/edit meeting selection **2610** may additionally evidence the meeting date, the meeting time, the meeting business unit such as business units within the client, the geographic location of the meeting, and additional information directed to the desirable attendees for that meeting **2612**. Selection of the add/edit meeting module may additionally allow for selection of the host, a point person, a moderator, a contact name or listing, target listings, moderators, speakers, or attendance rosters **2630**.

In this exemplary embodiment, upon selection of, for example, the venue, the venue name, address, telephone and/or fax number, contact name, and/or venue notes, may be displayed or may be edited. Additional information related to the venue may be viewed, such as the contract status with the venue, which may be, for example, unavailable, reserved, contract sent, contracted, or initial request made, for example. Additionally, the meeting room or area of the venue may be selected, as may be the capacity or cost, such as per person, of the venue. Thereby, aspects of the venue may be reviewed and/or edited by authorized users **2620** of the planning system. Additionally, authorized users may, for example, record payment to the venue, or other owed expenses, such as by credit card, or printing of a business check. A user may additionally make venue arrangements for audio visual equipment to be supplied to the venue, such as the audio visual supplier, an audio visual contact name, supplier name, supplier location, or supplier contact information. Additionally, alternative audio visual suppliers may be entered.

Selection **2610** of the add/edit meeting module may additionally allow for the selection of particular functions for the speaker and/or moderator. For example, information may be tracked for the speaker and/or moderator, such as a record of whether a speaker has provided personal information, such as a personal biography, curriculum vitae, speaker honoraria amount, speaker airline preferences or expenses, car, hotel, food, or other travel preferences or expenses. Other expenses related to the meeting and/or the speaker may be tracked, such as room fees, restaurant charges, audio visual charges, entertainment charges, other miscellaneous expenses, and each expense tracked by the add/edit meeting module may be interoperable with the accounting systems apparent to those skilled in the art, such as Microsoft Quicken or Microsoft Great Plains, for example.

Further, the add/edit meeting selection **2610**, as set forth hereinabove, may allow for the tracking for particular attendee functions, such as invited participants, acknowledged participants, payment of acknowledged participants, tracking of accounts receivable, and tracking of accounts paid. Overall, a total attendee or guest count may be provided, such as in order to select numbers of handouts necessary for availability during a meeting. Particular attendees may be tracked using the add/edit meeting module, such as overall attendance or attendee status, which may include yes, no, wait listed, cancel, or invited, whether or not an attendee actually attended, whether an attendee is, or is to be, removed, and whether particular attendee confirmations are to be made available or have been provided by a confirmation fax, mail,

e-mail, invitation, telephone call, or other methodology. All attendance information may be conveniently provided in, for example, a summary table.

In this exemplary operational embodiment, the planning system may additionally include tracking for all persons and places involved with a particular project, brand, client, or multiple clients, within the planning system. For example, an add/edit person or place module may be included within the system, that may allow the system to overall track **2640** particular persons, venues, audio visual suppliers, hosts, speakers, moderators, users, and/or attendees. For example, for each person or venue, or vendor entered into the system, contact information may be available. This contact information may include, for example, names, addresses, multiple telephone numbers, mobile telephone numbers, fax numbers, emergency contact information, or additional information, such as comments, that will allow for contacting of particular contacts within the person, company, or venue or vendor data base. It will be apparent to those skilled in the art that multiple fields may be available for entry of particular information, such as fax numbers for home, business, or other, or multiple name fields, which may allow, for example, the selection of first, last and middle names, or the selection of company names. Additionally, drop-down menus may be provided for selection of particular information within the contacts listing, such as suffixes to follow particular names, such as MD, Sr., Ph.D., Pharm D., RN, APRN, PA, DO, or Esq., for example. Further, additional fields may be added, or may be available, for entry of information specific to particular projects, meetings, brands, or clients. For example, target profiles for particular meetings may include, for example, education level information, ME numbers, DEA numbers, AOA numbers, district numbers, social security numbers, or other necessary or desired information. Further, where available, electronically available information may additionally be provided in the contacts listing such as electronic, or scanned, business cards or other specialized or specialty information, such as a speaker curriculum vitae or biography.

Variations of the fields set forth hereinabove, or additions made thereto, may be monitored **2660** by a permission level security interface. For example, a field sales representative may be entitled to access, or be allowed to modify, only particular information related to a particular meeting. Other information may not be added or edited by that field representative, and this accessibility may be controlled by a security interface, as will be apparent to those skilled in the art. Further, all or a portion of the information passed from a remote planning system to a local interface may be secure information, such as by data encryption apparent to those skilled in the art.

In this exemplary operational embodiment, a user entering information may be allowed to enter information, or may be prompted to enter particular information, such as wherein a meeting profile, person profile, or place profile, has been created, and particular information has not been entered. For example, upon completion of a meeting request, the planning system may prompt a field sales representative to create a target list for that meeting, wherein a target list has not yet been created. The field representative may then either enter a target list as part of selection **2630**, or select that a target list will be entered at a later date. This target list may then be entered, such as, for example, by a download in the entirety from, for example, a Microsoft Excel spreadsheet, or the information may be, at that date or a later date, hard coded manually into the system.

Further, particular information items may be provided to the user filling out a given request, as the request is being filled out. For example, the system may provide 2650 specific instructions that are applicable to particular events or event types. For example, the marketing department within a particular client may limit attendance to 15 attendees per meeting, such as due to marketing budgetary constraints. In such an instance, wherein a meeting has been set up using the add/edit meeting module, and it is entered that the marketing department is to fund the meeting, a message box may appear for the user that instructs "at marketing funded events, attendance is limited to 15 per meeting, and attendees must have signed consulting agreements, may not bring spouses, and will not be paid honorarium. Further, the venue budget is limited to $2000 per meeting, and any excess must be entered into the 'additional expense field.'" The user may be given the option to accept or reject these instructions. Thus, the planning system may include a plurality of business rules, that may be applied to particular meeting, projects, brands, or clients. These business rules may be entered by clients, field representatives, planning system administrators, or any authorized user.

Further, such as within the business rules, the planning system may include a hierarchy, such as a hierarchy through which meeting requests, or expense requests must pass, as illustrated in the block diagram of FIG. **81**. In such an embodiment, a meeting request may be generated, and may be passed for approval, such as automatically by e-mail, to a client administrator. Alternatively, expenses within the meeting request may be passed to an accounting department within the client for approval. In such an exemplary embodiment, upon approval by the accounting department, check requests may be automatically generated, such as by interface of a check generation software to the planning system approval methodology, thereby generating checks without any human interaction other than approval of the expense. Alternatively, as will be apparent to those skilled in the art, a check request may be manually approved, and a check may be manually generated.

In an exemplary embodiment, business rules may be applied using components and templates, wherein components are the data that has been, or may be captured, and wherein the templates select the manner in which the components will be stored and/or displayed. FIG. **82** is a block diagram illustrating the accessing, from a user work station, via the internet, such as Internet Explorer or Netscape, of the planning system databases. The web server that receives the user request, may break the request down into component definitions, and may select a template in accordance with the desired or received component, as illustrated.

FIG. **83** is a schematic illustration of an architecture **2902** to employ the planning system discussed hereinabove. The architecture **2902** may include, for example, a rich client **2904**, a thin client **2906**, a presentation level **2908**, a business logic level **2910**, and a data level **2912**. The data level may include, for example, data bases, legacy systems, and external applications. The architecture may further employ, for example, a firewall.

This multitier architecture may be developed using, for example, a Microsoft Windows DNA model. The presentation tier may include, for example, user interfaces. The business logic level may include, for example, the business rules discussed hereinabove. The presentation level of the architecture may use, for example, HTML programming for presentation to the user. Further, tools and applications available on the presentation level may use, for example, standard HTML or XML. In the data level, data may be resident, in part, in a database on, for example, a Microsoft SQL server. Universal data access from, for example, the business logic, may be

granted through, for example, an ADO. Using a distributed server environment, the planning system may include a plurality of distributed servers. For example, a data architecture, such as a database, may reside on one server, and middle tier components, such as business logic, may reside on a second server. HTML pages, or other user interfaces, may reside on the second server or may reside on a third server. Thereby, no single server experiences overload.

It will be apparent to those skilled in the art that various modifications and variations may be made in the apparatus and process of the present invention without departing from the spirit or scope of the invention. Thus, it is intended that the present invention cover the modification and variations of this invention provided they come within the scope of the appended claims and the equivalents thereof.

What is claimed is:

1. At least one non-transitory computer-readable medium including computer executable instructions comprising:

instructions for providing at least one business rule;

instructions for providing at least one priority designation;

instructions for providing at least one meeting editor configured to generate at least one meeting for at least one client in accordance with the at least one business rule and the at least one priority designation; and

instructions for providing at least one tracker configured to track data items indicative of at least some of invitees to the at least one meeting, respondents to invitation to the at least one meeting, at least one speaker of the at least one meeting, at least one host of the at least one meeting, finances of the at least one meeting, and a venue of the at least one meeting, and wherein the at least one tracker is configured to communicate at least two of the data items with the meeting editor;

wherein said meeting editor is configured to use the priority designation to weight the at least two of the data items for the at least one meeting differently to generate the at least one meeting in accordance with the at least one business rule, and the at least one business rule associates the at least two of the data items together both in combination with and independently of the at least one meeting.

2. The computer-readable medium of claim **1**, wherein the at least one client is selected from the group consisting of at least one system administrator, at least one meeting planner, at least one meeting attendee, at least one speaker, and at least one service supplier.

3. The computer-readable medium of claim **1**, wherein said meeting editor comprises:

a meeting set-up module for setting up each meeting; and

a meeting manager for managing each set-up meeting.

4. The computer-readable medium of claim **3**, wherein said meeting editor further comprises:

a fulfillment request form manager; and

a reporter.

5. The computer-readable medium of claim **3**, wherein the at least one meeting manager comprises at least one selected from the group consisting of an attendance listing manager, an invitee listing manager, a speaker listing manager, task listing manager, and a security listing manager.

6. The computer-readable medium of claim **1**, wherein the at least one computer-readable medium forms a distributed network application.

7. The computer-readable medium of claim **1**, wherein said meeting editor comprises at least one dynamic link library and at least one markup language template.

8. The computer-readable medium of claim **1**, wherein said at least one tracker comprises at least one database.

9. The computer-readable medium of claim **8**, wherein the at least one database is configured to store at least one data attribute selected from the group consisting of a meeting code, a meeting date, a meeting time, a meeting type, a meeting status, a meeting number and a client meeting number.

10. The computer-readable medium of claim **9**, wherein the at least one database is configured to store data attributes of the at least one speaker and the venue such that at least one of the at least one speaker and the venue are relationally linked to at least one of the meeting code and the meeting date.

11. The computer-readable medium of claim **9**, wherein the at least one database is configured to relationally store the venue as one of a pending status and a confirmed status.

12. The computer-readable medium of claim **1**, further comprising instructions for providing a finance tracker.

13. The computer-readable medium of claim **12**, wherein said finance tracker is configured to track expenses relating to at least one of the at least one meeting.

14. The computer-readable medium of claim **13**, wherein said finance tracker is configured to track a type of each expense, a status of each expense, an estimated amount of each expense, and an actual amount of each expense.

15. The computer-readable medium of claim **1**, wherein said tracker uses a contacts database.

16. The computer-readable medium of claim **15**, wherein the contacts database is configured to store a name, address, and phone number of at least one of an invitee, an attendee, a speaker, a host, a venue, a moderator, and an audio-visual supplier for at least one of the at least one meeting.

17. At least one non-transitory computer-readable medium including computer executable instructions comprising:

instructions for storing a plurality of event parameter sets, the event parameter sets including at least some of recruiting, venue and speaker meeting parameters associated with at least one event plan, wherein at least some event parameters of the event parameter sets have associated business rules restricting selection of others of the event parameters of the event parameter sets in combination with the business rule associated event parameters;

instructions for presenting ones of the event parameters for selection, wherein the presentation of the event parameters from each of the plurality of event parameter sets in the database is restricted by:

selection of at least one other presented event parameter from the plurality of event parameter sets; and

at least one of the business rules responsively to selection of a business rule associated event parameter from the plurality of event parameter sets in the database; and

at least one priority designation associated with at least two of the event parameters from the plurality of event parameter sets; and

instructions for reporting information associated with the at least one event plan in accordance with selected event parameters from the event parameter sets.

18. The computer-readable medium of claim **17**, further comprising instructions for generating cost estimates.

19. The computer-readable medium of claim **17**, wherein said instructions for reporting comprise instructions for generating one or more of a group consisting of multiple day reports, invitation reports, status summary report, results report, hyperlink report, cumulative attendance report, and financial reports.

20. At least one non-transitory computer readable medium including computer-executable instructions comprising:

instructions for storing a plurality of event parameter sets in at least one database, the event parameter sets including at least some of recruiting, venue and speaker meeting parameters associated with at least one assigned-time event plan, wherein at least some event parameters of the event parameter sets have associated business rules restricting selection of others of the event parameters of the event parameter sets in combination with the business rule associated event parameters; and

instructions for presenting ones of the event parameters for selection by a meeting editor, wherein the presentation of the event parameters from each of the plurality of event parameter sets in the database is restricted by:

selection of at least one other presented event parameter from the plurality of event parameter sets; and

at least one of the business rules responsively to selection of a business rule associated event parameter from the plurality of event parameter sets; and

at least one priority designation associated with at least two of the event parameters.

21. The computer-readable medium of claim **20**, further comprising instructions for providing data associated with said assigned-time event plan, in accordance with at least one selected event parameter.

22. The computer-readable medium of claim **20**, wherein said instructions for providing data associated with said assigned-time event plan comprise instructions for generating one or more of a group consisting of multiple day reports, invitation reports, status summary report, results report, hyperlink report, cumulative attendance report, and financial reports.

23. The computer-readable medium of claim **21**, further comprising instructions for generating cost estimates.

24. The computer-readable medium of claim **21**, further comprising instructions for providing a security access control.

25. The computer-readable medium of claim **24**, wherein the security access control is configured to support at least two levels, wherein at least one of the levels is associated with at least one system administrator and another of the levels is associated with users.

26. At least one non-transitory computer readable medium including computer executable instructions comprising:

instructions for storing at least one business rule;

instructions for storing at least one priority designation;

instructions for generating at least one meeting in accordance with the at least one business rule and the at least one priority designation; and

instructions for tracking data items indicative of at least some of invitees to the at least one meeting, respondents to invitation to the at least one meeting, at least one speaker for the at least one meeting, at least one host for the at least one meeting, finances for the at least one meeting, and a venue for the at least one meeting;

wherein said priority designation weights the at least two of the data items for the at least one meeting differently when the meeting is generated, and the at least one business rule associates the at least two of the data items together both in combination with and independently of the at least one meeting.

27. The computer-readable medium of claim **26**, wherein the instructions for tracking data items further comprise instructions for tracking travel for the at least one speaker and the at least one host.

28. The computer-readable medium of claim **26**, further comprising instructions for tracking creations, reads, updates, additions, edits, and deletions from at least one database.

29. The computer-readable medium of claim **26**, wherein the instructions for tracking comprise instructions for tracking at least one audio-visual supplier for the at least one meeting.

30. The computer-readable medium of claim **26**, further comprising instructions for generating reports concerning the at least one meeting.

31. The computer-readable medium of claim **26**, further comprising instructions for storing at least one data item selected from the group consisting of data items indicative of a meeting code for the meeting, at least one of a meeting date, a meeting time, a meeting type, a meeting status, a meeting number and a client meeting number.

32. The computer-readable medium of claim **31**, further comprising instructions for storing data items indicative of the at least one speaker and the venue, and wherein at least one of the at least one speaker and the venue are relationally linked to at least one of the meeting code and the meeting date.

33. The computer-readable medium of claim **26**, wherein the instructions for tracking comprise instructions for tracking a type of expense, a status of an expense, an estimated amount of an expense, and an actual amount of an expense.

34. At least one non-transitory computer readable medium including computer executable instructions comprising:

instructions for storing a plurality of event parameter sets, the event parameter sets including at least some of recruiting, venue and speaker meeting parameters associated with at least one assigned-time event plan, wherein at least some event parameters of the event parameter sets have associated business rules restricting selection of others of the event parameters of the event parameter sets in combination with the business rule associated event parameters;

instructions for presenting ones of the event parameters for selection, wherein the presentation of the event parameters from each of the plurality of event parameter sets is restricted by:

selection of at least one other presented event parameter from the plurality of event parameter sets; and

at least one of the business rules responsively to selection of a business rule associated event parameter from the plurality of event parameter sets; and

instructions for reporting information associated with the assigned-time event plan, in accordance with said assigned time and at least one selected event parameter.

35. The computer-readable medium of claim **34**, further comprising instructions for generating cost estimates.

36. The computer readable medium of claim **34**, wherein said instructions for reporting comprise instructions for generating one or more of a group consisting of multiple day reports, invitation reports, status summary report, results report, hyperlink report, cumulative attendance report, and financial reports.

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