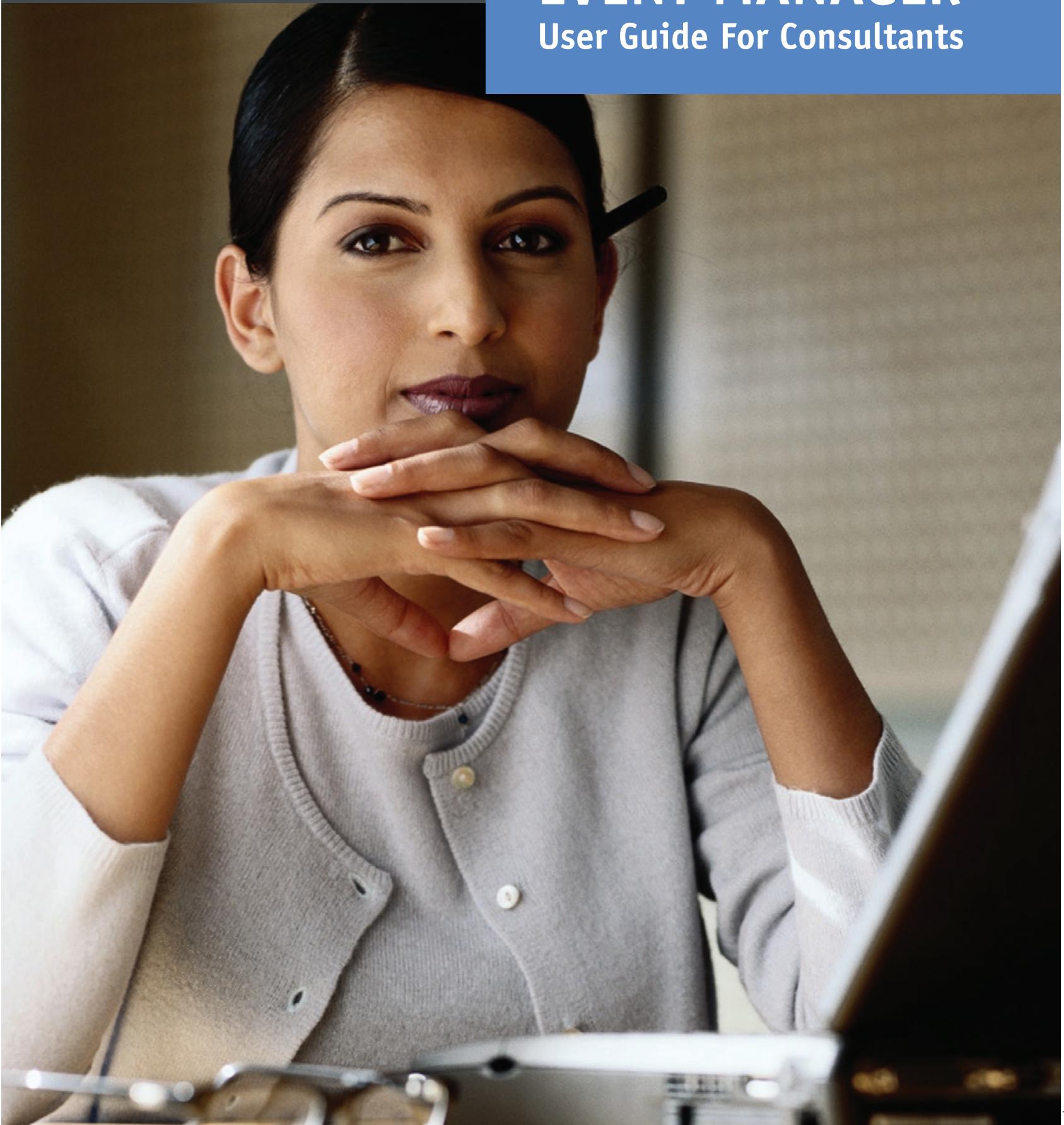




EVENT MANAGER

User Guide For Consultants





IMPORTANT NOTICE

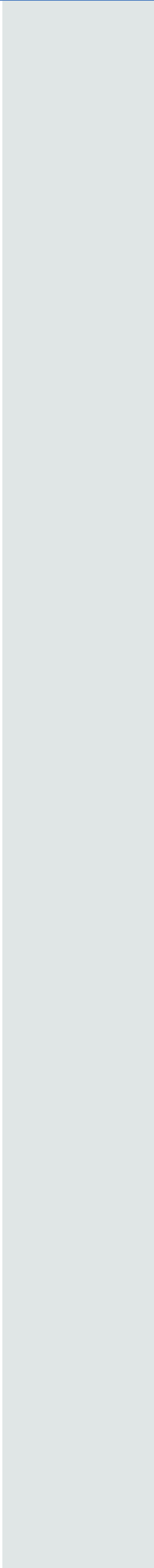

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CCS070476

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1.0 INTRODUCTION

The Event Manager Website allows you to manage your own schedule. You can:

- View your schedule.
- Accept and deny event requests.
- Block dates and set dates with exceptions.
- Set a monthly date quota.
- Close your month to new classes.
- View and print a variety of specialized reports.
- View and print a list of class participants.
- Export reports to Microsoft Word and Excel.



You are responsible for staying on top of your schedule. We recommend you access the Event Manager website daily to ensure that you are always up to date.

1.1 Training Options

In addition to this User Guide, you can also receive training by:

- Attending Webinars.
- Receiving one-on-one training from Teresa Anderson (see section 1.2 below).
- Completing the Training Worksheet. This worksheet will help you practice using the website.

1.2 Getting Help

Please contact Teresa Anderson at 801-817-7109 or teresa.anderson@FranklinCovey.com for technical assistance with the Event Manager website.

1.3 About this User Guide

This User Guide provides step-by-step instructions for consultants on how to perform the key functions provided in the Event Manager website.

The User Guide is organized by task.

1.4 Updates and Additions

From time to time, adjustments will be made to the website which will require changes to the User Guide instructions. To ensure that you always have the latest information, updated pages will be provided as needed. Simply remove the outdated pages and replace with the new.

2.0 GETTING STARTED

In this section you will learn how to log on to the Event Manager website.



You must be connected to the internet via Internet Explorer to access the Event Manager website. Other internet browsers will not work.

2.1 Logging On

There are two different ways to log on to Event Manager:

- Outside the FranklinCovey network but connected to the internet
- From within the FranklinCovey network (either on-site at FranklinCovey or via VPN.)

2.0 GETTING STARTED

2.1.1 Outside the FranklinCovey Network

1. Open Internet Explorer.
2. Type **https://em.franklincovey.com** in the **Address** text box and press **Enter**.



3. A password dialog box appears. Type *fc/your user name* and *your password* and press **Enter**.



Your user name and password for Event Manager are the same as your FranklinCovey network user name and password. If your network credentials are updated or changed, your Event Manager credentials will also change.

4. The *Event Manager* website appears.

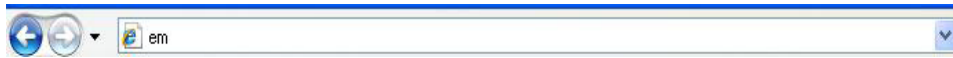
A screenshot of the FranklinCovey Co. Event Manager website. The browser title is "Consultant Calendar - Windows Internet Explorer". The address bar shows "http://em/emdev/ConsultantScheduleViewCalendar.aspx?conId=ndgree". The page header includes "FranklinCovey Co. Event Manager" and "Thursday, September 20, 2007". The user is logged in as "Teresa Anderson's Role: Administrator". The main content area shows a calendar for the month of February 2008. The calendar is a grid with columns for days of the week and rows for dates. Events are listed in the cells, such as "CoA FOCUS: Achievin... NANCY GREENWOOD... Franklin Covey" on Feb 6 and "CoR 7 Habits of Hig... NANCY GREENWOOD... Franklin Covey" on Feb 7. A "Consultant details" sidebar is visible on the right, showing information for Nancy Greenwood: Name: NANCY GREENWOOD, Id: ndgree, Email: nancy.greenwood@franklincovey.com, Phone: (915) 482-1177, Extension: (blank), Mobile: (blank), Status: Full Time, Region: Western. There are links for "Preferences" and "Curricula".

Note: The Event Manager website always opens to your Consultant Schedule page for the current month.

2.0 GETTING STARTED

2.1.2 From the FranklinCovey Network

1. Open Internet Explorer.
2. Type “em” in the Internet Explorer address text box as shown below:



3. Press **Enter**.
4. The *Event Manager* website opens to your calendar for the current month.

3.0 VIEWING YOUR SCHEDULE

From the *Consultant Schedule* page you can:

- Review your schedule.
- Accept Pending Events (A pending event is a request for you to teach a class—also known as an event.)
- Set personal preferences.
- View curricula (those courses you are certified to teach).



You cannot view other consultant's schedules and they cannot view yours. However, Client Partners, Client Coordinators, and the Consultant Schedule Manager (Marilyn Kerekes) can view your schedule and request events.

3.0 VIEWING YOUR SCHEDULE

3.1 The Consultant Schedule Page

YOU CAN CLICK ON EITHER THE "BACK" COMMAND BUTTON OR THE "BACK" NAVIGATION ARROW TO NAVIGATE BETWEEN PAGES.

ACCEPT PENDING EVENTS

MAIN MENU

CHANGE DATES

CONSULTANT DETAILS

SET PREFERENCES

VIEW CURRICULA

CLICK ON THE SCROLL BAR TO VIEW THE REST OF THE PAGE.

SCHEDULED EVENT

The screenshot shows a web browser window displaying the 'FranklinCovey Co. Event Manager' interface. The page title is 'FranklinCovey Co. Event Manager' and the date is 'Thursday, September 20, 2007'. The user is identified as 'Teresa Anderson's Role: Administrator'. The main content is a calendar for March 2008, showing a grid of dates from 1 to 31. Each date cell contains a scheduled event, such as 'CoA FOCUS: Achiev...', 'CoR 7 Habits of Hig...', or 'Local Only, Cal...'. A 'Back' button and 'Jump to today' link are visible at the top left of the calendar. A 'Accept Pending Events: (15)' button is located at the top right. On the right side, there is a 'Consultant details' box for Nancy Greenwood, including her name, ID, email, phone, extension, mobile, status, and region. Below this box are links for 'Preferences' and 'Curricula'. A scroll bar is visible on the right edge of the calendar grid.

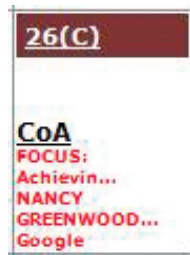
3.0 VIEWING YOUR SCHEDULE

3.1.1 Understanding the Color-coded Legend








To view the legend, use the scroll bar located on the right side of the page to scroll down to the bottom of the page.

Color codes: Onsite event | Certification(OnSite) | Certification(Public) | Content Course | Public Program | Non Billable | Date unavailable
 (H) = Hold | (C) = Committed
 (CoR) = Confirmation Requested | (CoA) = Confirmation Acknowledged | (CoD) = Confirmation Denied
 (CaR) = Cancellation Ack. Requested | (CaA) = Cancellation Ack. Acknowledged

Each event listed on your calendar includes a colored bar that is linked to the legend. This color coded bar provides at-a-glance information about the event.



3.1.2 Understanding the Colored Codes

COLORED BAR	EXPLANATION
	A brown bar indicates an on-site event at a client location.
	A magenta bar indicates an on-site certification.
	A purple bar indicates a public certification.
	A dark blue bar indicates a content course.
	An orange bar indicates a public program.
	A medium blue bar indicates a non-billable day.
	A red bar indicates a date you have blocked out as unavailable. <i>For instructions on blocking dates, refer to section 5.1.</i>

3.0 VIEWING YOUR SCHEDULE

3.1.3 Understanding the Acronyms

ACRONYM	EXPLANATION
H	A hold has been requested for an event on this date.
C	The event has been confirmed.
CoR	You are requested to confirm or deny a request.
CoA	You have accepted the request.
CoD	You have denied the request.
CaR	You are requested to confirm you are aware an event has been canceled.
CaA	You have acknowledged that an event has been canceled.

3.0 VIEWING YOUR SCHEDULE

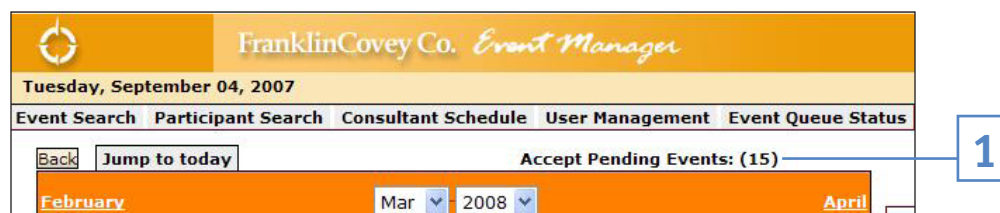
3.2 Accepting Pending Events

In this section you will learn how to view and accept pending events. A pending event is one that has been scheduled for you by a Client Partner or the Event Scheduler Manager and is awaiting your acceptance or denial.

The website allows you to look at your pending events in context on your calendar so you can determine whether or not to accept the event. For example, if you have back-to-back events pending, one in California and one the next day in New York, you may want to deny one of the events because it will not be feasible given the travel time required.

To accept pending event(s), complete the following steps:

1. From your *Consultant Schedule* page, click **Accept Pending Events**:



2. A list of all pending events appears:

The screenshot shows a window titled "Pending Acknowledgements". It contains a table with three columns: "Job#", "Begin Date", and "End Date". The table lists 15 rows of data. A blue box with the number "3" is positioned to the left of the table, with a line pointing to the table.

Job#	Begin Date	End Date
10038431	16 Oct 2007	18 Oct 2007
10037943	24 Jan 2008	24 Jan 2008
10037935	25 Jan 2008	25 Jan 2008
10038006	29 Jan 2008	30 Jan 2008
10037939	05 Feb 2008	05 Feb 2008
10038399	06 Feb 2008	07 Feb 2008
10037944	22 Feb 2008	22 Feb 2008
10038186	04 Mar 2008	04 Mar 2008
10038398	05 Mar 2008	07 Mar 2008
10038397	11 Mar 2008	12 Mar 2008
10037941	13 Mar 2008	13 Mar 2008
10037945	25 Mar 2008	25 Mar 2008
10037965	26 Mar 2008	28 Mar 2008
10037988	01 Apr 2008	01 Apr 2008
10037952	21 Apr 2008	23 Apr 2008
10037937	25 Apr 2008	25 Apr 2008

At the bottom of the window is a "Cancel" button.

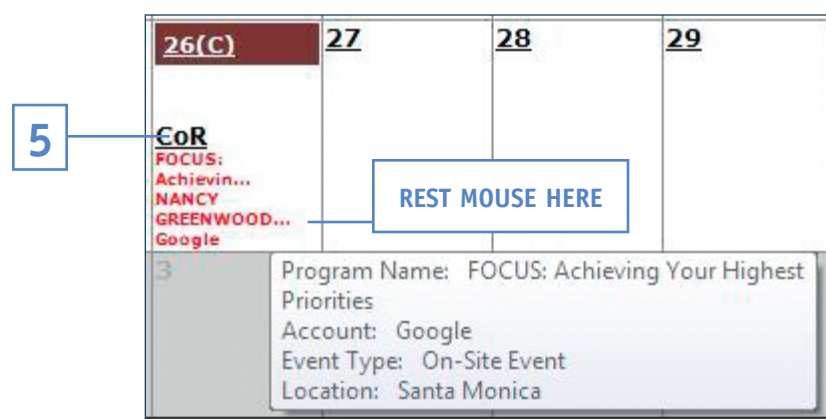
Note: Acknowledgements appear in "Begin Date" order.

3.0 VIEWING YOUR SCHEDULE

- 3. Click the job number of the event you want to accept.
- 4. A calendar view with the pending event appears:



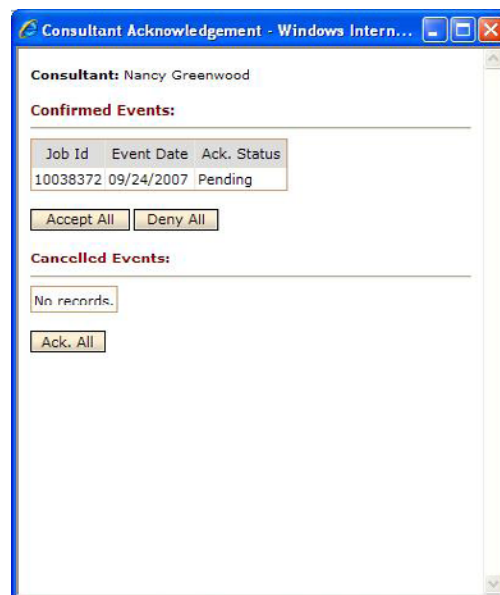
Note: To obtain additional information about the event, rest your mouse over the text that appears beneath CoR. A pop-up with additional event details appears:



- 5. To accept the event, click **CoR** (Confirmation Requested).

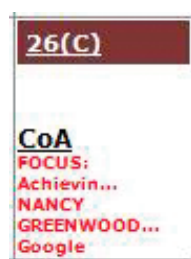
3.0 VIEWING YOUR SCHEDULE

- The **Consultant Acknowledgement** dialog box appears:



Note: The status of the event as shown in the "Ack. Status" column is pending until the event is either accepted or denied.

- To accept the listed event(s), click **Accept all**.
For multiple-day events, each day of a multiple-day event appears as a separate entry, however, you must accept all the days or deny all the days, you cannot accept or deny single days of a multiple day event.
- A **Confirmation** dialog box appears; click **OK** to confirm that you are accepting the event(s).
- The status of the event on your calendar also changes from CoR (Confirmation Requested) to CoA (Confirmation Accepted).



- Continue viewing and accepting events until all events have been acknowledged.

3.0 VIEWING YOUR SCHEDULE

3.2.1 Denying an Event



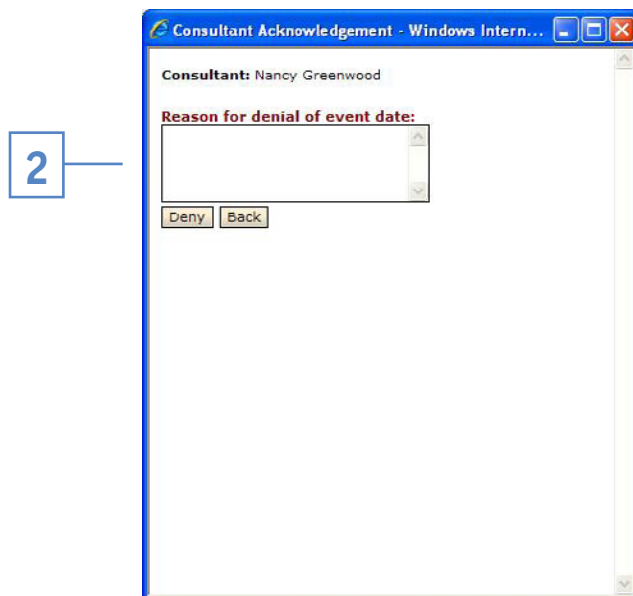
You should only deny an event if you have a legitimate reason to do so. The Event Scheduler Manager will contact you if the reason given is unclear or unacceptable.

To deny an event, follow these steps:

1. Follow steps 1–5 (3.2) above. When the **Consultant Acknowledgement** dialog box appears, click **Deny All**.
2. The **Consultant Denial** dialog box appears. Type the reason for your denial in the **Reason for denial of event date** text box and click **OK**. You have unlimited room in the text box to type an explanation. Be aware that your explanation can be viewed by everyone with access to the system.



Denying an event is not the same as blocking a date because you are unavailable. When you deny an event, the date is freed for another event booking. If you are not available on this date at all, refer to section (4.1.1) for instructions on how to block a date.



3. The status of the event on your calendar also changes from CoR (confirmation requested) to CoD (Confirmation Denied).

20	21
CoD	CoD

3.0 VIEWING YOUR SCHEDULE

3.3 Viewing An Event Summary

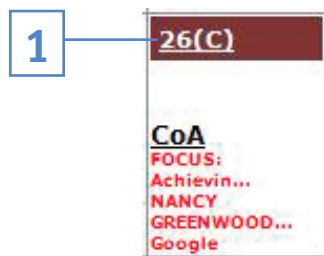
The *Event Summary* page is a detailed list of all the information you need about an event.

The page includes:

- Event information.
- FranklinCovey contact information.
- Consultant's contact.
- Client contact information.
- Schedule information.
- Materials information.
- Pricing information.

To access and print the *Event Summary* page, complete the following steps:

1. Double-click on the colored bar at the top of the date box.



3.0 VIEWING YOUR SCHEDULE

2. The *Event Summary* page appears:

3

Print this page

Event Summary Event Notes Downloadable Format

Event Information

Job Number: 10036290 **Delivery Channel:** On site
Program Format: ONE DAY **Anticipated Seats:** 23
Promotion: Not selected **Material Format:** STANDARD MATERIALS
Account: 40804966 Google **Consultant's Contact:** Billing Address
Program Type: FOCUS: Achieving Your Highest Priorities **Price Tier:** Bronze
Program Dates: 11/26/2007 **Hostess:**

Name	E-mail Address	Phone Number	Extension	Mobile Number	Job Role
Bruce Goeas	Bruce.Goeas@FranklinCovey.com	(123) 456-7890			Client Partner
NANCY GREENWOOD	nancy.greenwood@franklincovey.com	(915) 482-1177			Consultant
Laurie Orton	Laurie.Orton@FranklinCovey.com				Coordinator

Contact Information

Billing Address:	Shipping Address:	Notes:
40804966 Google Laura Gimple 2400 Bayshore Pkwy Denver, CA 94043-1103, SOS Ph: (463) 824-607 Ext: 23523	40804966 Google Monica Gilmore 804 Arizona Ave Santa Monica, CA 90401-1610, SWE Ph: (460) 409-6 Ext: 100 monica@ooodle.com	

YOUR CONTACT

Note: Your client contact is shown on the "Consultant's Contact" line.

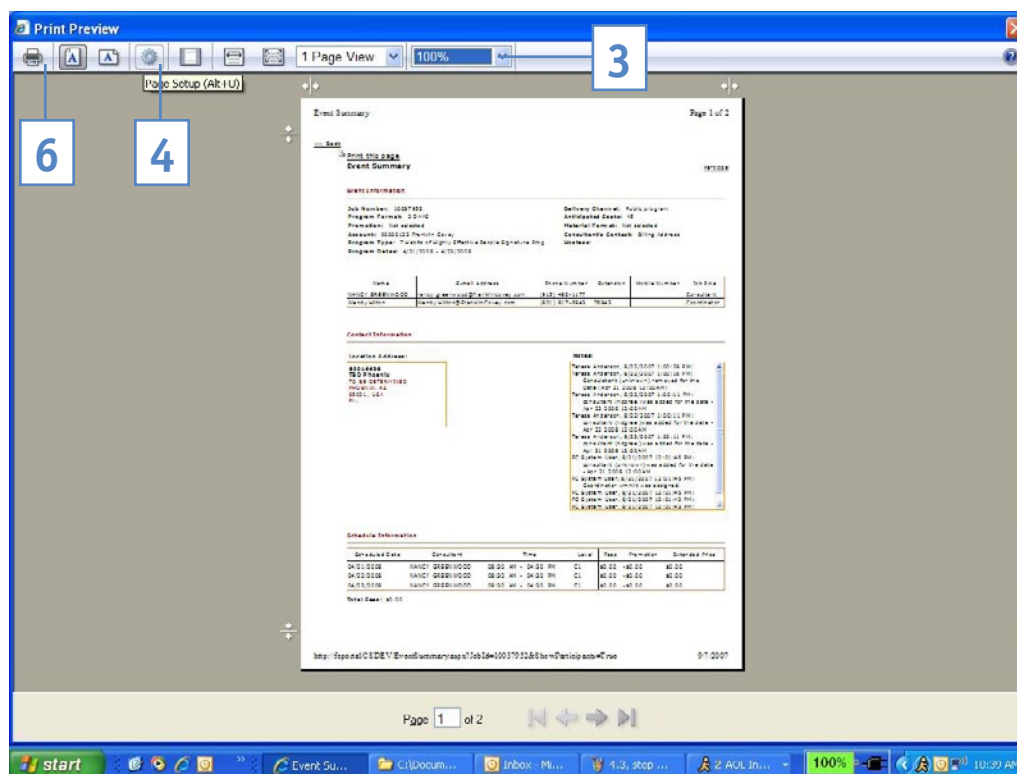
3. To print the *Event Summary* page, click **Print this page**.

3.0 VIEWING YOUR SCHEDULE

3.3.1 Change Print Margins

The default print option shrinks the page to a very small size. To increase the size on the page, follow these instructions.

1. Choose **File/Print Preview** from the Explorer menu bar.
2. The Print Preview window appears:



3. From the **Change Print Size** drop-down list select **100%**.
4. Click the page set-up icon. The **Page Set-up** dialog box appears.
5. Change the right and left margins to **.25** and click **OK**. The **Print Preview** window appears again.
6. Click the **Printer** icon.

3.0 VIEWING YOUR SCHEDULE

3.3.2 Accessing Participant Information

From the **Event Summary** page, you can also view or export information about the participants who will be attending the event.

1. Click **Participant Info**.

«« Back
 Print this page
Event Summary Participant Info

Event Information

Job Number: 10038398	Delivery Channel: Content course
Program Format: 3 DAYS	Anticipated Seats: 25
Promotion: Not selected	Material Format: Not selected
Account: 40750886 Franklin Covey	Consultant's Contact: Billing Address
Program Type: 7 Habits of Highly Effective People Signature Prog	Hostess:
Program Dates: 3/5/2008 - 3/7/2008	

2. A list of all the participants registered for that class appears:

Participants Info:

Name	Account Name	Account Number	Promotion	Committed	Confirmation No	Street	
Carlo Joseph	PUBLIX SUPERMARKETS	00072392	No Promotions	Yes	10789281	PO Box 407	Lak
Ginger Roundtree	PUBLIX SUPERMARKETS	00072392	No Promotions	Yes	10789282	1130 Huri Shls Rd NE Ste 1300	Law
David Dobbins	PUBLIX SUPERMARKETS	00072392	No Promotions	Yes	10789283	PO Box 407	Lak
Mary DeyArmin	PUBLIX SUPERMARKETS	00072392	No Promotions	Yes	10789284	PO Box 407	Lak
Brice Hitchcock	STARBUCKS	40913081	No Promotions	Yes	10789251	2200 1st Ave S Ste 100	See
Brad Palmisono	STARBUCKS	40913081	No Promotions	Yes	10789252	7635 Bayview Club Dr Apt 2C	Ind
Sarah Svrcek	STARBUCKS	40913081	No Promotions	Yes	10789253	550 W Washington Blvd # 200 2185 N	Chi

Close

Note: For instructions on exporting the list to Word or Excel see section 5.2.

3.0 VIEWING YOUR SCHEDULE

3.4 Viewing Your Curricula

The system administrator pre-populates the system with a list of the curricula you are certified to teach.

To view curricula, follow these steps:

1. From the **Consultant details** section of the **Consultant Schedule** page, click **Curricula**.



You cannot update this information yourself; however, you will want to check the list periodically to make sure it is up-to-date. Contact the Events Scheduler Manager if you see any errors in the information or wish to make changes.

2. The **Consultant Curricula Maintenance** page appears:

Consultant details	
Name:	Nancy Greenwood
Id:	ndgree
Email:	nancy.greenwood@franklincovey.com
Phone:	
Extension:	
Mobile:	
Status:	Full Time
Region:	Western
	Preferences >>>
	Curricula >>>

3. Review the information on the page to make sure it is correct.

4.0 SETTING PREFERENCES

Event Manager allows you to set your own preferences. You can:

- Block dates you are not available.
- Set exceptions for certain dates such as; local only, Western region only, call first.
- Close out your month to any new events.
- Set a maximum number of days you are available in a month.

4.1 Setting Preferences

To set preferences, complete the following steps:

1. From the **Consultant Schedule** page, click **Preferences**.
2. The **Consultant Preference—Consultant Preference Update** page appears:

Event Scheduler Administration

Consultant Preference → Consultant Preference Update

January 2008

Su	Mo	Tu	We	Th	Fr	Sa
	31	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	29	30	31	1	2
3	4	5	6	7	8	9

Click or Drag mouse across dates to select/deselect.

Color codes:

Onsite event	Certification(OnSite)	Certification(Public)	
Content Course	Public Program	Non Billable	Date unavailable
Recurring Date unavailable	Date with Exception	Recurring Date with Exception	

Save Unavailable Dates Save Dates with Exceptions Month Close

Consultant details

Name: NANCY GREENWOOD
Id: ndgree
Email: nancy.greenwood@franklincovey.com
Phone: (915) 482-1177
Extension:
Mobile:
Status: Full Time
Region: Western

[Calendar »»](#)
[Curricula »»](#)



From this page you can complete all the actions described in the rest of this section.

4.0 SETTING PREFERENCES

4.1.1 Blocking Dates

To block dates when you are not available to teach, follow these steps:

1. Click or drag your mouse to select the dates you wish to block. The selected dates highlight.
2. To deselect dates, click or drag your mouse across the same dates.
3. Click **Save Unavailable Dates**.
4. A **Comments** dialog box appears. The words “Consultant not available” appear in the text box.



Note: You may add additional comments to explain in more detail why you are unavailable on these dates by typing in the text box. Remember that other users can see your explanation.

5. Click **Save**. The date(s) you selected appear highlighted in red on the calendar.

4.0 SETTING PREFERENCES

4.1.2 Saving Dates with Exceptions

This is your way to communicate important information to the Client Partners and the Events Scheduler Manager. For example, you can note that on certain dates you are not available to travel, or can only travel locally, or alert Client Partners to call you before they book a particular date. Your reason for the exception appears on the exception dates as a pop-up that can be viewed by Client Partners, the Events Scheduler Manager, and Coordinators.

Important note: If you are not available for this date under any circumstances, you should block the date (see section 4.1.1) rather than saving it as an exception.

1. From the **Consultant Preference** page, select the date(s) you wish to save with exceptions.
2. Click **Save Dates With Exceptions**.
3. A **Comments** dialog box appears.
4. Type an explanation of the exception in the text box and click **Save**.
5. The dates you saved appear in green on the calendar. When a mouse is rested on these dates, a pop-up with your comments appears as shown below:

Click or Drag mouse across dates to select/deselect.

February 2008						
Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	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	29	1
2	3	4	5	6	7	8

Color codes:

Onsite event	Certificat	
Content Course	Public Program	Date unavailable
Recurring Date unavailable	Date with Exception	Recurring Date with Exception

Save Unavailable Dates | Save Dates with Exceptions | Month Close

Local Only

4.0 SETTING PREFERENCES

4.1.3 Closing Your Month

If you do not want to accept any more events, you can close your month to new events by completing the following steps:

1. Go to the month you wish to close.
2. From the *Consultant Preferences* page, click **Month Close**.
3. A confirmation dialog box appears.
4. Click **OK**.
5. The remaining dates in the month appear in red to indicate the dates are unavailable on your calendar.

4.0 SETTING PREFERENCES

4.1.4 Block or Set Exceptions for Recurring Dates

You can block a particular day of the week for which you will be unavailable on a recurring basis. For example, if you are not available to work on Mondays for the next three months, you can restrict these dates. You can set an exception for a reoccurring date.

To block or set an exception for recurring dates, complete these steps:

1. From the *Consultant Preferences* page, select the day you wish to block from the drop-down list.

The screenshot shows the 'Recurring Days' form. A blue box labeled '1' highlights the 'Day of week' dropdown menu, which is currently set to 'Sunday'. A blue box labeled '2' highlights the 'From' and 'To' date input fields. A blue box labeled '3' highlights the 'Save Unavailable Dates' and 'Save Dates with Limitations' buttons.

2. Specify the beginning and end dates by either:
 - a. Typing the date in the text box in this format: month/day/year or [mmddyyyy].
 - b. Clicking on the calendar icon and selecting the date.
3. Save these changes by:
 - a. Clicking **Save Unavailable dates** to save the dates with only the preset “Consultant not Available” explanation. The date will be blocked and will show as red on your calendar.
 - b. Clicking **Save Dates with Exceptions**. A **Comments** dialog box appears. (4.1.2) Type an explanation of the exception in the text box and click **Save**. The date will appear in green on your calendar with the pop-up comment. Remember that a date set with exceptions can still be booked for an event that meets the exceptions.

The screenshot shows the 'Recurring Days' form with a table of saved exceptions. The table has columns for Action, Week Days, Begin Date, End Date, Dates with Exceptions?, and Reason. Below the table are the 'Day of week' dropdown (set to Sunday) and 'From' and 'To' date input fields, along with 'Save Unavailable Dates' and 'Save Dates with Exceptions' buttons.

Action	Week Days	Begin Date	End Date	Dates with Exceptions?	Reason
	Sunday	11/12/2007	11/12/2008	No	Consultant not available
	Tuesday	10/16/2007	10/30/2007	Yes	No travel
	Sunday	10/01/2007	10/31/2007	No	Consultant not available
	Monday	02/04/2008	02/25/2008	Yes	Local Only
	Monday	03/03/2008	03/31/2008	Yes	Local Only, Call First

4.0 SETTING PREFERENCES


4. Your calendar information is updated and the following information appears:

4.1.5 Unblocking Dates

- To unblock date(s) you previously blocked, click the date(s) on the calendar and then click **Save Unavailable Dates**. The date(s) no longer appear in red.
- To unblock recurring dates, click the icon under Action. A box will open listing all future dates remaining. Select dates you want to remove from the recurring sequence and save.

Note: This will split into consecutive sequences on the consultant preference screen.

Recurring Days

Action	Week Days	Begin Date	End Date	Dates with Exceptions?	Reason
	Sunday	11/12/2007	11/12/2008	No	Consultant not available

4.0 SETTING PREFERENCES

4.1.6 Set a Maximum Number of Days to Work per Month

You can set a limit on the number of days you are available per month. After you are booked for the set number of days, the rest of the days in the month are automatically blocked.

1. Enter the maximum number of days you want to work each month.

Maximum # of Days per month

I want to work days per month.

2. Click **Save**.

5.0 CREATING REPORTS

The Event Manager website allows you to create, export, and print different reports concerning event information and participant information.

EVENT REPORT PARAMETERS	PARTICIPANT EVENT PARAMETERS
<ul style="list-style-type: none">• Program Parameters<ul style="list-style-type: none">- Job number- Date range- Program status• Client Parameters<ul style="list-style-type: none">- Account #- Name- Contact- City- State- Type• Roles<ul style="list-style-type: none">- Client Partner- Region- Coordinator• Program Type• Delivery Channel• Consultant Scheduled• Consultant Acknowledgment Status	<ul style="list-style-type: none">• Confirmation #• Job #• Confirm Status• Event City• Date Range• Program Type• Participant Name• Account #• Account Name• Delivery Channel• Event Search

5.0 CREATING REPORTS

5.1 Creating an Event or participant Report

To create a report, complete the following steps:

1. From the *Consultant Schedule* page, click **Event Search** or **Participant Search** from the menu depending on the type of report you want to create.
2. The applicable page appears:

Note: This is the Event Search page; however, the same instructions apply to the Participant Search page.

The screenshot shows the FranklinCovey Co. Event Manager interface. At the top, there is a navigation menu with options: Event Search, Participant Search, Consultant Schedule, User Management, and Event Queue Status. Below the menu is a search parameters section with three columns: Program Parameters, Client Parameters, and Roles. The Program Parameters column includes fields for Job #, Program Status (dropdown), Date Range, Program Type, Delivery Channel, and Consultant Scheduled. The Client Parameters column includes fields for Account #, Name, Contact, City, State, and Type. The Roles column includes dropdowns for Client Partner, Region, and Coordinator. At the bottom right of the search parameters section, there are buttons for Search, Reset, and Column Preferences. A blue box with the number '1' points to the navigation menu, and another blue box with the number '4' points to the Search button.

3. Select or type in the search parameters you prefer from the available text boxes.
4. Click **Search**.

*Note: To return to the **Consultant Schedule** page, click **Consultant Schedule** from the main menu.*

5.0 CREATING REPORTS

- The search results appear in the text box at the top of the page.

SEARCH RESULTS

The screenshot shows the FranklinCovey Co. Event Manager interface. At the top, there's a navigation bar with tabs for 'Event Search', 'Participant Search', 'Consultant Schedule', 'User Management', and 'Event Queue Status'. Below this is a table of search results. A callout box labeled 'SEARCH RESULTS' points to the first row of the table. Below the table are several filter sections: 'Program Parameters', 'Client Parameters', and 'Roles'. A 'Search' button and a 'Reset' button are located at the bottom right of the filter section. A callout box labeled '6' points to the 'Reset' button. The table has columns for Job#, Delivery Channel, Owner, Program Type, Program Status, Account#, Account Name, Contact Name, Event City, Event State, Account City, and Account State. The first row shows Job# 1, On site, sysuser, FOCUS: Achieving Your Highest Priorities, Committed, 05050505, HER MAJESTY'S SECRET SERVICE, James Dond, Salt Lake City, UT, Salt Lake City, UT.

Job#	Delivery Channel	Owner	Program Type	Program Status	Account#	Account Name	Contact Name	Event City	Event State	Account City	Account State
1	On site	sysuser	FOCUS: Achieving Your Highest Priorities	Committed	05050505	HER MAJESTY'S SECRET SERVICE	James Dond	Salt Lake City	UT	Salt Lake City	UT
10037914	On site	aksaha	7 Habits for Managers: Managing Yourself	Committed	40004966	Google	Laura Gimple			Mountain View	CA

Note: Use the scroll bars at the top and bottom of the text box to see all the search result information.

- To get more information about the search results:
 - From the Event Search page, click on a row in the search results box to link to the Event Summary page for that event.
 - From the Participant Search page, click on an individual's name to get additional information about the person.
- To search for different results, click the **Reset** button. The information clears and you can search for new results.



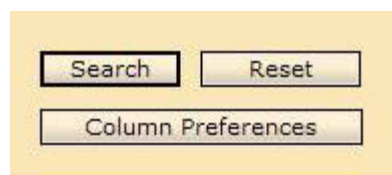
Refer to the Setting Column Preferences (5.1.1) and Printing and Exporting Report sections (5.2) for additional information. Refer to the Index for sample reports.

5.0 CREATING REPORTS

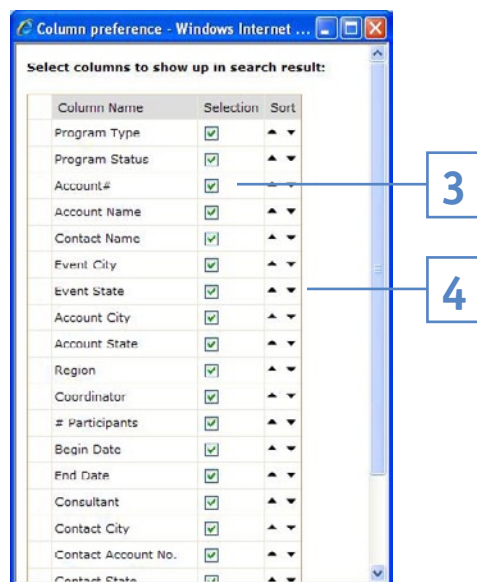
5.1.1 Set Column Parameters

You can choose which columns you want to display in the search results by completing these steps:

1. Click **Column Preferences**, from the *Event Search* or *Participant Search* page.



2. The applicable **Column preference** dialog box appears. The example below is for an event search but the same steps apply to a participant search.



Note: The default column preference setting is for all columns to appear.

3. Deselect any columns you do not want to appear in the search results.
Note: The job number, delivery channel, and owner columns are default columns and always appear in the search results.
4. You can also select the order in which columns appear by using the sort arrows to move columns up or down in the list.

Note: Use the scroll bar to view all the available columns.

5.0 CREATING REPORTS

5. Click **Save and Close**.

Contact State	<input checked="" type="checkbox"/>	▲ ▼
Location Account Name	<input checked="" type="checkbox"/>	▲ ▼
<input type="button" value="Save and close"/>		



The column preferences you set are the new default settings until you reset them.

6. The revised search results appear.

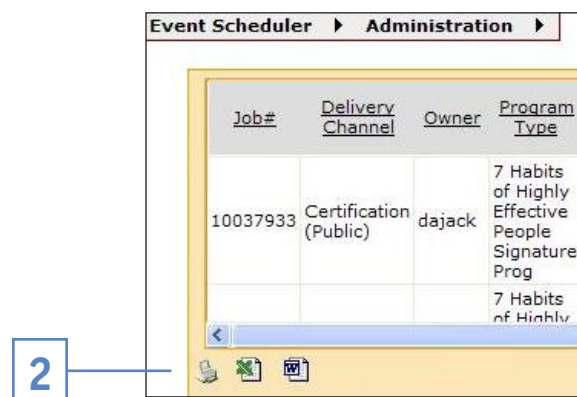
5.0 CREATING REPORTS

5.2 Printing or Exporting a Report

You can print a report or export it to Word or Excel. The same instructions apply to both event reports and participant reports.

5.2.1 Printing a report

1. Select the search results you want (see section 5.1).
2. Click the **Printer** icon.

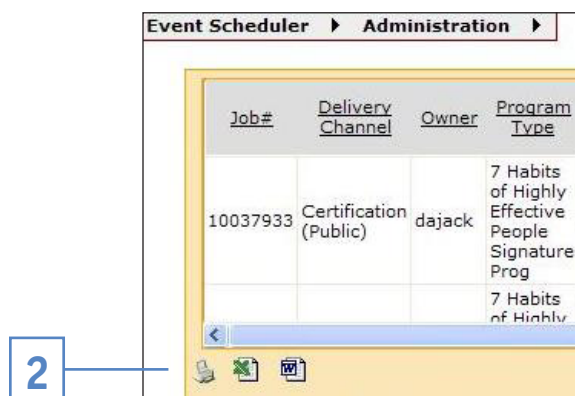


3. A page with the search results appears.
*Note: To change print preferences, click **File/Print** or **File/Print Preview**.*
4. Click **Print this page**.

5.0 CREATING REPORTS

5.2.2 Exporting a Report to Word or Excel

1. Select the search results you want (see section 5.1.)
2. Click the **Excel** or **Word** icon as appropriate.



3. The **File Download** dialog box appears:



4. Click **Open** to open the file directly in the selected application or click **Save** to save the file to your computer.

Note: When the report is saved it can be manipulated just like any other Excel or Word file.

6.0 APPENDIX

Consultant Schedule Sample Report

Job #	Delivery Channel	Program Type	Program Status	Consultant	Begin Date	End Date	Event City	Event State	Account Name	Coordinator	Region
10036248	On site	7 Habits of Highly Effective People Signature Prog	Committed	NANCY GREENWOOD	29-Jan-08	31-Jan-08	Rochester	NY	Fuji Photo Film USA, Inc.	lpnoor	All
10037935	Public program	FOCUS: Achieving Your Highest Priorities	Committed	NANCY GREENWOOD	25-Jan-08	25-Jan-08	BIRMINGHAM	AL	Franklin Covey	tavsmi	All
10037939	Public program	FOCUS: Achieving Your Highest Priorities	Committed	NANCY GREENWOOD	5-Feb-08	5-Feb-08	TBD	NJ	Franklin Covey	tavsmi	All
10037941	Public program	FOCUS: Achieving Your Highest Priorities	Committed	NANCY GREENWOOD	13-Mar-08	13-Mar-08	LITTLE ROCK	AR	Franklin Covey	tavsmi	All
10037943	Public program	FOCUS: Achieving Your Highest Priorities	Committed	NANCY GREENWOOD	24-Jan-08	24-Jan-08	PHOENIX	AZ	Franklin Covey	wmhilt	All
10037945	Public program	FOCUS: Achieving Your Highest Priorities	Committed	NANCY GREENWOOD	25-Mar-08	25-Mar-08	PHOENIX	AZ	Franklin Covey	wmhilt	All
10037952	Public program	7 Habits of Highly Effective People Signature Prog	Committed	NANCY GREENWOOD	21-Apr-08	23-Apr-08	PHOENIX	AZ	Franklin Covey	wmhilt	All
10037965	Public program	7 Habits of Highly Effective People Signature Prog	Committed	NANCY GREENWOOD	26-Mar-08	28-Mar-08	PASADENA	CA	Franklin Covey	wmhilt	All
10038186	Public program	FOCUS: Achieving Your Highest Priorities Signature Prog	Committed	NANCY GREENWOOD	4-Mar-08	4-Mar-08	TBD	NJ	Franklin Covey	tavsmi	All
10038396	On site	7 Habits of Highly Effective People Signature Prog	On Hold	NANCY GREENWOOD	21-Jan-08	23-Jan-08			Wells Fargo	jaqniw	Not Assigned
10038397	Certification(Onsite)	7 Habits of Highly Effective People Signature Prog	Committed	NANCY GREENWOOD	11-Mar-08	12-Mar-08			Wells Fargo	chmcal	Not Assigned
10038398	Content course	7 Habits of Highly Effective People Signature Prog	Committed	NANCY GREENWOOD	5-Mar-08	7-Mar-08	Irvine	CA	Franklin Covey	ksande	Not Assigned
10038399	Certification(Onsite)	7 Habits of Highly Effective People Signature Prog	Committed	NANCY GREENWOOD	6-Feb-08	7-Feb-08	Burbank	CA	STARBUCKS	mievam	Not Assigned

6.0 APPENDIX

Participant List Sample Report

Confirmation No.	Job No.	Event Start Date	Event End Date	Program Type	Prior Tier	Account Number	Account Name	Name	Participant Street	Participant City	Participant State	Phone Number	Email Address
10861007	10031781	20-Sep-07	20-Sep-07	FOCUS: Achieving Your Highest Priorities	Bronze	40978638	George Weston Bakeries	Bob Seifright	1561 Wade Hampton Blvd	Clemville	SC	8645236669	bobseifright@wbakeries.com
10861008	10031781	20-Sep-07	20-Sep-07	FOCUS: Achieving Your Highest Priorities	Bronze	40978638	George Weston Bakeries	Jim Martin	4 Tucker Ave	Beaufort	SC	8433216042	martin@wbakeries.com
10861508	10031781	20-Sep-07	20-Sep-07	FOCUS: Achieving Your Highest Priorities	Bronze	40978638	Black And Decker	Anthony Sandrine	3220 Magdalena Dr	Charlotte	NC	9105883600	tsae210@babs.com
10861731	10031781	20-Sep-07	20-Sep-07	FOCUS: Achieving Your Highest Priorities	Bronze	40978641		Christopher Clements	266 Mulcaster Rd	Pelham	NC	9196502011	christopher.clements@vo.com
10861015	10031781	20-Sep-07	20-Sep-07	FOCUS: Achieving Your Highest Priorities	Gold	40978636	Ernie Lar	Janae Frasher	611 E. York St	Gastonia	NC	8647874238	janae.frasher@frinlay.com
10290886	10031781	20-Sep-07	20-Sep-07	FOCUS: Achieving Your Highest Priorities	Palladium	40978648	4880TT	Leah Thompson	2757 Crane North Rd	Roseme	SC	8432923238	leah.thompson@bbott.com
10292694	10031781	20-Sep-07	20-Sep-07	FOCUS: Achieving Your Highest Priorities	Bronze	40978629	Heinz & Imhoff, LLC	Susan Dwy	3325 Stonington Ln Ste 302	Charlotte	NC	7047598158	susan@huplanning.com
10291543	10031781	20-Sep-07	20-Sep-07	FOCUS: Achieving Your Highest Priorities	Bronze	40978615	BBAT	Kristen Cobb	200 W 2nd St	Winston Salem	NC	3367331686	knobbe@bbatt.com
10292712	10031781	20-Sep-07	20-Sep-07	FOCUS: Achieving Your Highest Priorities	Bronze	40978623	Tropical Nut & Fruit Co.	Dorcas Hill	1100 Continental Blvd	Charlotte	NC	7046020610	dhill@tropicalfruit.com
10296302	10031781	20-Sep-07	20-Sep-07	FOCUS: Achieving Your Highest Priorities	Palladium	40941668	GMAC	Jessica Bowers	3401 Tomson Way Ste 400	Charlotte	NC	7045466004	jessica.owen@llnsmcfs.com
10296938	10031781	20-Sep-07	20-Sep-07	FOCUS: Achieving Your Highest Priorities	Bronze	40978698	Jon Barry & Associates	Kim Keaton	216 W. Phillips Ct NE	Concord	NC	7047234209	keaton@jbarry.com
10292907	10031781	20-Sep-07	20-Sep-07	FOCUS: Achieving Your Highest Priorities	Bronze	40978697	Communities D. Schools	John Conroy	324 S Main St	Winston	NC	8286654533	john.conroy@mcdevell.k12.nc.us
10298083	10031781	20-Sep-07	20-Sep-07	FOCUS: Achieving Your Highest Priorities	Bronze	40978628	Terr's Team Real Estate	Julie Clark	100 Augusta National	Anderson	SC	8642457299	julieclark@chart.net
10291592	10031781	20-Sep-07	20-Sep-07	FOCUS: Achieving Your Highest Priorities	Bronze	40978689	Abott Labs	Kath Cummins	9623 Buxwaxway Ct	Charlotte	NC	7045214119	kath.cummins@abott.com
10860664	10031781	20-Sep-07	20-Sep-07	FOCUS: Achieving Your Highest Priorities	Bronze	40978628	Abott Labs	Jon McConnell	580 Audubon Manor Blvd	Ortha	FL	8136551518	jonc@mcconnell.com
10861523	10031781	20-Sep-07	20-Sep-07	FOCUS: Achieving Your Highest Priorities	Gold	40978641	Ernie Lar	Eric Lewis	611 E York St	Gastonia	NC	8647874238	Eric.A.Lewis@frinlay.com
10861525	10031781	20-Sep-07	20-Sep-07	FOCUS: Achieving Your Highest Priorities	Bronze	40978643	Grant Associates, Inc.	Stephen Vance	218 DeBum St Ste 206	Davidson	NC	7048972249	steph@grantassociates.com