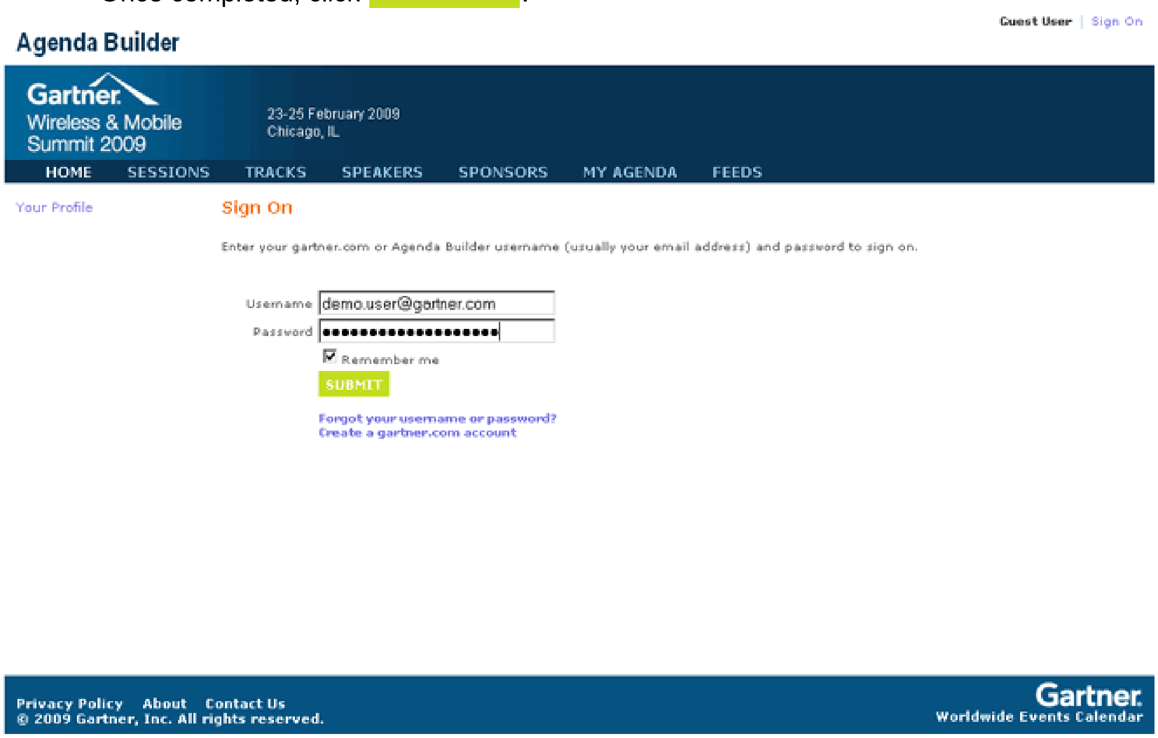
Agenda Builder Help

Version 1.0.0

Signing on to Agenda Builder

1. Click on the “Sign On” link located in the top right menu of Agenda Builder.
2. Enter your gartner.com or Agenda Builder username and password into the “Username” and “Password” fields. **Note:** If you do not have a gartner.com account, one can be created by clicking on the “Create a gartner.com account” link.
3. Select the “Remember me” box if you would like Agenda Builder to remember your details so that you do not have to log in the next time you visit.
4. Once completed, click SUBMIT.



Note: Once you have successfully logged into Agenda Builder, you will be directed to your Agenda Builder home page and your name will be displayed in the top right menu.

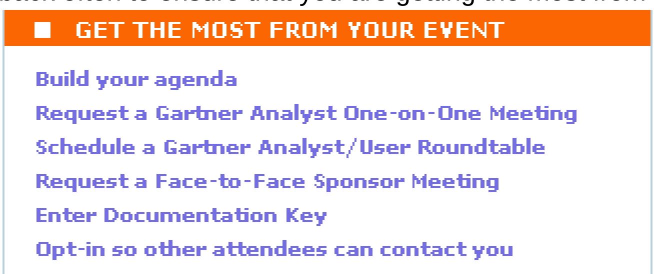
Home Page

Key Features:

(**Note:** These features may vary from event to event)

GET THE MOST FROM YOUR EVENT

This section highlights key features that will help you get the most from your attendance at the event. As features are enabled throughout the event cycle, links are added to this section. Check back often to ensure that you are getting the most from your event.



MY AGENDA

This section is added to your home page as soon as you start creating your personal agenda and provides you with a quick display of your upcoming agenda items. Click on any of the sessions to see more details, or click on the “more…” link to view your full personal agenda.

ATTENDEES’ TOP 10 SESSIONS

This section displays the top 10 sessions that other attendees who are attending the event have added to their personal agendas. This section dynamically updates as the agendas are created and each title links directly to the session so that you can review the details and add it to your personal agenda.

ATTENDEES' TOP 10 SESSIONS

- Welcome Address
- The Mobile and Wireless Scenario
- 'Past Is Prologue: What the Teens Will Bring'
- Mobile Messaging: From E-Mail to Presence-Enabled Social Networking
- The Untethered Society: Beyond Context
- Notebooks, Tablets PC and MIDs: Converging or Attracting Different Audiences?
- Emerging Trends and Technologies Scenario: Technology Radar Screen
- Pocket Power: The Annual Update on Mobile Devices
- Panel: Mobile Vendor SWOT – How Viable Are Your Mobile and Wireless Choices?
- Panel Discussion: Wireless Meets the Internet – Round 2

MESSAGES

This section is added as soon as you receive any messages within the Agenda Builder tool. Clicking on the message will show you the full message details.

MESSAGES

Sample Agenda Builder Message
Demo User
05 February 2009 02:51 PM

ANNOUNCEMENTS

This section displays whenever there are announcements within the Agenda Builder tool. Clicking on the announcement will load the full details. Check back often for import event information.

ANNOUNCEMENTS

Sample Announcements
05 February 2009 02:56 PM

PREMIER SPONSORS

This section displays the premier sponsors of the event. Clicking on the sponsors logo will take you to their event profile where you can view sessions they are presenting and request a Face-to-Face meeting if applicable.

PREMIER SPONSORS

Build Your Agenda

Agenda Builder allows you to prepare in advance for the upcoming event. You can build a personal agenda, request Gartner Analyst One-on-One Meetings, schedule a Gartner Analyst/User Roundtable session, request Face-to-Face Sponsor Meetings (if available), and register for Workshop sessions.

Adding Sessions to Your Agenda:

1. Once signed on to Agenda Builder click on the "Sessions" tab in the top menu to display the full event agenda.
2. Browse the agenda and click on the session titles to see the session details.
3. When you find a session that you would like to add to your agenda, click ADD and the session will instantly be added to your agenda.
   Note: You can add all of the sessions in the current display to your agenda by clicking ADD ALL.

Sessions Requiring Registration:

There are various session types that may require additional registration steps due to limited availability. REGISTER will display next to these sessions. Once you click REGISTER, the session will be added into your agenda with the Registration Pending status. Once your request has been processed, you will receive an e-mail and a message will be displayed on your Agenda Builder home page alerting you of the registration status. If the session is confirmed, it will display in your agenda as Registration Confirmed. If the session is full or if you do not qualify for the session you will receive an e-mail and a message will be displayed on your home page alerting you of the status.

Note: Some sessions require additional registration costs. These sessions will indicate the additional costs in the header and registration will need to be completed through the event registration site.

Refining the Views:

You can refine the sessions being displayed by using several options within the Agenda Builder tool.

Views Drop-Down: Views: ALL

The Views drop-down box is found at the top of the sessions page and allows you to select from several different options that can be used to filter the session list. These options vary from event to event, but can contain:

Sessions by Day: The days of the event will be listed and when you make your selection, only the sessions that occur during the selected day will be displayed.
Keynote View: When you select the Keynote View option, only the event Keynote Sessions will be displayed.
Top 10 View: When you select the Top 10 View option, the Top 10 sessions that event attendees have added to their agenda will be displayed.
Job Role List: When you select the Job Role List option, all of the job roles that have been setup for the event will be displayed. Select a job role and only the sessions that have been assigned to the selected job role will be displayed.
Session Type List: When you select the Session Type List option, all of the session types that are available at the event and their descriptions will be displayed. Select a session type and only sessions that are of the same session type will be displayed.
Vertical Industry List: When you select the Vertical Industry List option, all of the vertical industries that have been setup for the event will be displayed. Select a vertical industry and only the sessions that have been assigned to the selected vertical industry will be displayed.
Marketplace List: When you select the Marketplace List option, all of the marketplaces that have been setup for the event will be displayed. Select a marketplace and only the sessions that have been assigned to the selected marketplace will be displayed.

Tracks Tab: TRACKS

Clicking on the Tracks tab in the top menu will display the full list of Tracks that have been setup for the event and their descriptions. Click on a specific Track to view the sessions that have been assigned to the selected Track. You can add the track sessions directly to your agenda one at a time by clicking ADD, or you can add them all to your agenda by clicking on ADD ALL.

Speakers Tab: SPEAKERS

Clicking on the Speakers tab in the top menu will display the full list of speakers presenting at the event. Click on a specific speaker to view the speaker's details and the sessions that they will be presenting at the event. You can add the speaker's sessions directly to your agenda one at a time by clicking ADD, or you can add them all to your agenda by clicking ADD ALL.

Sponsors Tab: SPONSORS

Clicking on the Sponsors tab in the top menu will display the full list of sponsors exhibiting at the event. Click on a specific sponsor to view the sponsor's details. If the sponsor is presenting at the event their sessions will also be displayed. You can add the sponsor's sessions directly to your agenda one at a time by clicking ADD, or you can add them all to your agenda by clicking ADD ALL.

My Agenda Tab: MY AGENDA

Clicking on the My Agenda tab in the top menu will display the agenda that you have built for the event.

Removing Sessions From Your Agenda:

When you find a session that you would like to remove from your agenda, click REMOVE and the session is instantly removed your agenda.

Note: You can remove all of the sessions from your agenda by clicking REMOVE ALL SESSIONS while in the MY AGENDA tab.

Session Documentation

Agenda Builder allows registered attendees to preview and download the event documentation in PDF format for the Gartner analyst-led sessions before they arrive at the event, on-site, and post-event. Presentations will be re-uploaded to Agenda Builder post event to include any adaptations made live at the event.

Entering Your Documentation Key:

In order to view the event's session documentation you must enter the appropriate documentation key. The documentation key will be sent to you 2 weeks prior to the event.

1. Once you have signed into Agenda Builder you will be taken to the Home page. Click on the **Enter Documentation Key** link found in the "Get the Most from Your Event" box.
2. Enter the documentation key and click on the Submit button.

Viewing Documentation:

Once you have entered a valid documentation key you can view the event documentation by following these steps.

1. View your agenda by clicking on the MY AGENDA tab, or view the full event agenda by clicking on the SESSIONS tab.
2. Sessions that have documentation available will contain a blue PDF icon and document link. Example: PDF RA12_T4.pdf
3. Click on the link and the PDF will be displayed in a new window. If you have not entered a valid documentation key, you will be asked to enter it now.

Note: You can also view the event documentation using the Agenda Builder Mobile version of the site.

Downloading Documentation:

Once you have entered a valid documentation key you can download all of the event documentation by following these steps.

1. View your agenda by clicking on the MY AGENDA tab, or view the full event agenda by clicking on the SESSIONS tab.
2. Click on PDF DOWNLOAD ALL at the top of the page.
3. A zip file of all available documentation will be downloaded to your computer.
4. After you have extracted the zip file, please refer to the included readme file.

Gartner Analyst/User Roundtables

Gartner Analyst/User Roundtable sessions are available to fully registered end-user attendees at some events. These sessions are focused on a specific topic and are moderated by a Gartner analyst. Seating is limited and appointments will be scheduled on a first-come, first-served basis.

1. Once you have signed into Agenda Builder you will be taken to the Home page. Click on the **Schedule an Analyst/User Roundtable** link found in the "Get the Most from Your Event" box. **Note:** You can also click on the **Gartner Analyst/User Roundtables** link in the left menu.
2. The Gartner Analyst/User Roundtable page will be loaded outlining the Rules and Guidelines and the full list of Gartner Analyst/User Roundtable sessions taking place at the event.
3. Click on any of the Gartner Analyst/User Roundtable titles and the details of the roundtable with be displayed. Once you have found a session that you would like to attend, click REGISTER.

Once you click on the register button the session will be added to your agenda with the Registration Pending status. Once your request has been processed you will receive an e-mail and a message will be displayed on your Agenda Builder home page alerting you of the registration status. If the session is confirmed it will display in your agenda as Registration Confirmed. If the session is full or if you do not qualify for the session you will receive an e-mail and a message will be displayed on your Agenda Builder home page alerting you of the status.

Note: If you miss the opportunity to request a Gartner Analyst/User Roundtable pre-event, you can visit the One-on-One booking desk on-site to make your request.

Gartner Analyst One-on-One Meetings

Gartner offers fully registered attendees the exclusive opportunity to speak with a Gartner analyst in a private half-hour One-on-One meeting. These analyst One-on-One meetings can be requested pre-event using the Agenda Builder tool by following these steps:

1. Once you have signed into Agenda Builder you will be taken to the Home page. Click on the **Request a Gartner Analyst One-on-One Meeting** link found in the “Get the Most from Your Event” box. **Note:** You can also click on the **Gartner Analyst One-on-One Meetings** link in the left menu.
2. The Gartner Analyst One-on-One Meetings page will be loaded outlining the One-on-One Rules and Guidelines. Click on the **Request a One-on-One meeting** link after reviewing the guidelines and the Gartner Analyst One-on-One Meetings form will be loaded.
3. Enter the On-site Mobile Number
4. Confirm your E-mail Address
5. Select a focus area from the “Select a focus area” drop down.
6. Enter the specific issues that you would like to discuss in the “Please list your specific issues” box.
7. Enter the name of the analyst that you would like to meet with into the “Analyst Name” box.
8. Select the preferred time that you would like to meet from the “Preferred Time” drop down options.
9. Complete the fields and click on the Submit button.

Your request will be reviewed by the team and you will receive an e-mail, a message will be displayed on your home page, and if approved the meeting will be added to your agenda.

Note: If you miss the opportunity to request an analyst one-on-one meeting pre-event, you can visit the One-on-One booking desk on-site to make your request.

Face-to-Face Sponsor Meetings

(**Note:** This feature may not be available for all events.)

In order to plan ahead fully registered attendees can arrange a 30-minute meeting with a top technology providers pre-event using the Agenda Builder tool. There are three ways to schedule Face-to-Face Sponsor Meetings:

Option 1:

1. Once you have signed into Agenda Builder you will be taken to the Home page. Click on the **Request a Face-to-Face Sponsor Meeting** link found in the "Get the Most from Your Event" box.
2. You will be taken to the Face-to-Face Sponsor Meeting page which outlines the Face-to-Face Sponsor Meeting Appointment Times. Click on the **Request a Face-to-Face Meeting** link.
3. Select the sponsor that you would like to meet with from the Sponsor Name drop-down.
4. Enter the Meeting Topic
5. Enter the On-site Mobile Number
6. Select the preferred date that you would like to meet from the Preferred Date drop-down.
7. Select the preferred time that you would like to meet from the Preferred Time drop-down.
8. Click on the Submit button.

Your request will be reviewed by the team and you will receive an e-mail, a message will be displayed on your home page, and if approved the meeting will be added to your agenda.

Option 2:

1. Sign into Agenda Builder.
2. Click on the SPONSORS tab.
3. Click on the **Face-to-Face Sponsor Meetings** link in the left menu.
4. You will be taken to the Face-to-Face Sponsor Meeting page which outlines the Face-to-Face Sponsor Meeting Appointment Times. Click on the **Request a Face-to-Face Meeting** link.
5. Select the sponsor that you would like to meet with from the Sponsor Name drop-down.
6. Enter the Meeting Topic
7. Enter the On-site Mobile Number
8. Select the preferred date that you would like to meet from the Preferred Date drop-down.
9. Select the preferred time that you would like to meet from the Preferred Time drop-down.
10. Click on the Submit button and your request will be sent to the events team. Once your meeting has been confirmed it will be added to your agenda, you will receive an e-mail, and a message will be displayed on your home page.

Option 3:

1. Sign into Agenda Builder.
2. Click on the SPONSORS tab.
3. Select a sponsor from the list by clicking on their name.
4. Click on the **Request Meeting** link.
5. Enter the Meeting Topic
6. Enter the On-site Mobile Number
7. Select the preferred date that you would like to meet from the Preferred Date drop-down.
8. Select the preferred time that you would like to meet from the Preferred Time drop-down.
9. Click on the Submit button and your request will be sent to the events team. Once your meeting has been confirmed it will be added to your agenda, you will receive an e-mail,

and a message will be displayed on your home page.

Gartner Event Connect

The Gartner Event Connect tool allows you to find other users in the online directory. Your personal e-mail and phone number are not exposed and other users will only be able to contact you through the Agenda Builder messaging system. You must be opted-in in order to be visible to other attendees via the Event Connect tool.

How to Opt-In to Gartner Event Connect

You must opt-in to the Gartner Event Connect tool in order for other event users to find you. To opt-in to Gartner Event Connect please follow these steps:

1. Once you have signed into Agenda Builder you will be taken to the Home page. Click on the **Opt-in so other attendees can contact you** link found in the "Get the Most from Your Event" box. **Note:** You can also click on the **My Profile** link in the left menu of the Home page.
2. In the My Profile page, check the box next to "Gartner Event Connect Opt-in" and then click on the Submit button.

How to Opt-Out of Gartner Event Connect

If you do not want to participate in the Gartner Event Connect tool, you can opt-out by following these steps:

1. Once you have signed into Agenda Builder you will be taken to the Home page. Click on the **My Profile** link in the left menu.
2. In the My Profile page, un-check the box next to "Gartner Event Connect Opt-in" and then click on the Submit button.

Composing a New Message

1. Once you have signed into Agenda Builder you will be taken to the Home page. You have two options for creating a new message. You can either search for attendees or compose an e-mail if you already know which attendee you would like to message.

   Search for Attendees:

   1. Click on the **Search for Attendees** link in the left menu.
   2. Enter your search criteria and then click SEARCH. Note: You can add multiple criteria by separating the keywords with a semicolon ";".
   3. All users who have opted-into Agenda Builder for the event who match your search criteria will be displayed. **Note:** If you click on the user's company name you will see all opted-in attendees from the company.
   4. Click on the attendee's name and the Compose New Message screen will load.
   5. Enter the message subject line.
   6. Enter the message body.
   7. Click SEND.

   Compose:

   1. Click on the **Compose** link in the left menu.
   2. Click on the **Select Recipients** link.
   3. Enter your search criteria and then click SEARCH. Note: You can add multiple criteria by separating the keywords with a semicolon ";".
   4. All users who have opted-into Agenda Builder for the event who match your

search criteria will be displayed. **Note:** If you click on the user's company name you will see all opted-in attendees from the company.

5. Click on the attendee's name and the Compose New Message screen will load.
6. Enter the message subject line.
7. Enter the message body.
8. Click SEND.

Note: Messages sent through Agenda Builder are only available within the Agenda Builder tool and will be displayed in the MESSAGES area on the Agenda Builder Home page.

Checking Your Messages

1. Once you have signed into Agenda Builder you will be taken to the Home page. Click on the **Messages** link in the left menu. This will take you to your Inbox and display all of the messages that you have received. **Note:** Your latest messages will also be displayed in the MESSAGES box on the Home page.