RIXML Standards Suite v3.0 Enumeration List Review Project
Enumeration review:
Event information and interaction-related enumerations

Context:

If you have not already done so, please review the overview of the RIXML v3.0 Enumeration List Review Project.

To understand the context for the enumeration lists being reviewed in this document, please read the following sections of the *Draft Release Notes and Data Dictionary* document:

- Overview (pages 7-10)
- Event information (pages 78-80)
- The RIXML Interactions Standard v2.0 Data Dictionary (separate document, available here)

These documents are available on the RIXML website. Note that the page numbers referenced above are based on the draft version dated December 18, 2024; minor changes may occur in updated versions.

NOTE: The Interactions Standard was created well after the current production version of the Research Standard, yet it was built with the goal of eventually having it use the same Common and Enumeration schema files as are used in the other standards in the RIXML Standards Suite. For the Interactions standard to function correctly, an updated version of both the *Common* and the *Enumerations* (formerly called *Datatypes*) files were needed to incorporate tag sets and enumerations that had not been part of the RIXML Standards Suite v2.5. Although we are not updating the Interactions Standard at this time, the goal is to do so in the near future.

We would like to include the enumerations that are currently only used in the Interactions Standard for two reasons:

1. So that we can include the enumeration lists in the v3.0 enumeration list file, to be available for use in RIXML Interactions v3.0
2. Because there is some overlap between the Events functionality in the Research Standard and the functionality of the Interactions standard, there may be a chance to combine some enumeration lists.

Enumerations to review / review priority:

Enumeration list	Review importance
Event type and interaction purpose	
EventTypeEnum	HIGH
InteractionPurposeEnum	HIGH
EventDateType and InteractionDateType	
EventDateTypeEnum	HIGH
InteractionDateTypeEnum	HIGH
EventVenueType and InteractionMode	
EventVenueTypeEnum	HIGH
InteractionModeEnum	HIGH
Enumerations currently only used in Interactions standard	
InteractionRelationshipTypeEnum	MEDIUM
InteractionStatusTypeEnum	TBD
InteractionParticipantStatusEnum	TBD
InteractionVenueTypeEnum	TBD
InteractionReasonEnum	TBD
InitiatorEnum	TBD
InteractionLevelEnum	TBD

Details about how and where the above enumerations are used, along with specific questions for your consideration, appear below.

In addition to the above, we will review the following two enumeration lists that are used in the contact information tag set, to ensure that we are considering how these lists are used for event and interaction records:

- We will revisit the ContactInfoPurposeEnum list, since that list provides a mechanism to indicate what purpose a phone number or email address provided in an event record serves – is it the one you use to register, to listen to a replay, etc.
- We will also revisit the RoleEnum list, since most of the values in that list are used for event and interaction records. It is currently not included in the documentation for interactions, but will be available once we bring the common schema for all standards into the most recent version.

Details about each list:

Category 1: Tags related to event information

List: **EventTypeEnum**	Review importance: **MEDIUM**		
Where used: EventDetails.EventType	**Full documentation details:**		
	Tag description	page 78	
	Enumeration list	page 98	

Summary:	**Current values in the EventTypeEnum list:**
	IndustryConference
Notes:	CountryRegionConference
- The team that developed the Interactions standard took the EventTypeEnum list as the starting point for the InteractionPurposeEnum list. They streamlined some terms and added granularity to others; they also removed some terms that were deemed inconsistent or unneeded. - We are recommending combining these two lists, including all values in the newer InteractionPurposeEnum list and any terms from the EventTypeEnum list that are deemed essential/relevant.	SeminarConference ThematicConference TradeShowConference Conference AnnualShareholderMeeting IPO EarningsRelease EarningsReleaseDiscussion EarningsGuidancePreliminaryDiscussion SpecialShareholdersMeeting CorporateActionCommentary RoadShow GovernmentMeeting **Current values in the InteractionPurposeEnum list:** AnalystMarketing BankerMeeting Conference CorporateAccess Content DealRoadshow ExpertMeeting FieldTrip Idea InvestorDay NonDealRoadshow RelationshipMeeting Sales SalesSpecialist Social PublisherDefined

Questions:

- Unless there is a compelling reason not to do so, we are planning to combine these lists under the name InteractionPurposeEnum; it would be used in the Events tag set in the Research standard and in the Interaction Purpose tag set in the Interactions standard. Any objections?
- OK to keep the value of *Conference*, remove the *IndustryConference, CountryRegionConference, SeminarConference, ThematicConference*, and *TradeShowConference* values?
- Which other terms in the current EventTypeEnum list does your firm find valuable/relevant?
- Any additional terms to add?

Category 2: EventDateType and InteractionDateType

List: EventDateTypeEnum	Review importance: LOW
Where used: EventDate.type	**Full documentation details:**
	Tag description page 79
	Enumeration list page 98
Summary: **Notes:** • While interactions and events are not the same, it would be helpful to merge the EventDateTypeEnum and the InteractionDateTypeEnum because they both describe the *types* of dates used in a RIXML record. We can indicate in the documentation if there are instances in which a term should only be used for an event record or an interaction record.	**Enumeration values:** StartDate EndDate RegistrationDeadlineDate ExpirationDate PricingDate FilingDate LockupDate WithdrawalDate QuietPeriodEndDate **For reference, values in the InteractionDateTypeEnum list are: (only StartDate,EndDate, and ExpirationDate are in both):** CancellationDate DateDue DateRequested DeliveryDate EndDate ExpirationDate InitialContactDate StartDate n/a
Questions: • Unless there is a compelling reason not to do so, we are planning to combine these lists. Any objections? • Any additional terms to add?	

Category 3: EventVenueType and Interaction Mode

List: EventVenueTypeEnum	Review importance: HIGH
Where used: EventVenue.type	**Full documentation details:** **Tag description** page 78 **Enumeration list** page 98
Summary: **Notes:** - There is some overlap between the ProductFormEnum (reviewed previously), the EventVenueTypeEnum list (this list), and possibly the InteractionModeEnum list (see below); we would like to review the three lists to determine whether combining some or all of them would be beneficial. - The Venue tag set in the Interactions standard serves a different purpose; we will consider changing the name of that tag set and the related enumeration list during the development of the Interactions Standard v3.0 project.	**Enumeration values:** ConferenceCall OneOnOneMeeting GroupMeeting Webcast WrittenRelease InternetAudio InternetVideo MediaAppearance Transcript Brief Podcast Interview Panel
Questions: See grid below. Is there enough overlap in the purpose of the tags that use the ProductFormEnum, the EventVenueTypeEnum, and the InteractionModeEnum that it makes sense to combine them?	

List: InteractionModeEnum	Review importance: TBD
Where used: Currently only used in the Interactions standard	**Full documentation details:** **Tag description** page **Enumeration list** page
Summary: **Notes:** 	**Enumeration values:** Call DataFeed Email IM Inperson Model Product Service Video VoiceMail PublisherDefined
Questions: See grid on next page	

Below are the values included in these three enumeration lists. Would it make sense to rename the enumeration list FormatEnum and use it for Product.form, Event.EventVenueType, and Interaction.InteractionMode?

We can update the documentation to indicate instances in which a term is only relevant to some of the tags where this enumeration list would apply:

Product form	EventVenueTypeEnum	InteractionModeEnum
Comment	ConferenceCall	Call
Report	OneOnOneMeeting	DataFeed
Model	GroupMeeting	Email
Chart	Webcast	IM
Compilation	WrittenRelease	Inperson
Presentation	InternetAudio	Model
Event	InternetVideo	Product
Primer	MediaAppearance	Service
Directory	Transcript	Video
Glossary	Brief	VoiceMail
Overview	Podcast	PublisherDefined
EventInvitation	Interview	
PostEventSummary	Panel	
Podcast		
Interview		
PanelDiscussion		
ExhibitExplainer		
EventRecording		
Marketing		
TrainingMaterial		
PublisherDefined		

Category 4: Enumeration lists currently only used in Interactions standard

List: **InteractionRelationshipTypeEnum**	Review importance: TBD
Where used: Currently only used in the Interactions standard	**Full documentation details** (in Interactions Standard Data Dictionary)**:** **Tag description** page 25 **Enumeration list** page 31
Summary: A tag set very similar to the RelatedProduct tag set in the Research standard.	**Enumeration values:** ParentEvent SubEvent AnnualEvent
Notes: - The Interactions Standard was built to allow publishers to indicate both related **products** and related other **interactions**. It was built using the existing RelatedProduct tag set, with a similar one for interactions designed to model it as much as possible. - We think it would make sense to allow publishers to make a connection between a research item and one or more Interaction records. The current enumeration list was designed with options to indicate how another interaction record was related to the current one. We proposed adding a new value – Related ToResearch or similar – for instances when this tag set is included in a Research record.	
Questions: Does your firm publish conference/event announcements, documents, etc. in your research feed? If so, is there any reason not to add the ability to connect a research item with a related interaction record?	

List: **InteractionVenueTypeEnum**	Review importance: TBD
Where used: Currently only used in the Interactions standard	**Full documentation details** (in Interactions Standard Data Dictionary): **Tag description** page 13 **Enumeration list** page 32
Summary: The interaction venue tag provides the ability to indicate whether the interaction occurred at the interaction consumer's office (onsite) or not (offsite).	**Enumeration values:** Offsite Onsite
Notes:	
Questions: The terminology seems clunky because it is based on viewing the interaction from one type of participant's perspective. Are there alternative terms we could use?	

List: InteractionStatusTypeEnum	Review importance: LOW
Where used: Currently only used in the Interactions standard	**Full documentation details** (in Interactions Standard Data Dictionary)**:** **Tag description** page 22 **Enumeration list** page 31
Summary:	**Enumeration values:** Accepted Confirmed Delivered Declined Invited New Offered Postponed Tentative WaitListed PublisherDefined
Notes: This list is used to record the participant's *intended* attendance (e.g., how they RSVPd); the indication of their actual attendance is in the next list.	
Questions: Any changes?	

List: InteractionParticipantStatusEnum	Review importance: TBD
Where used: Currently only used in the Interactions standard	**Full documentation details** (in Interactions Standard Data Dictionary)**:** **Tag description** page 19 **Enumeration list** page 29
Summary:	**Enumeration values:** Accepted Attended Canceled LateCancel NoShow Rejected
Notes: This list is used to record the participant's actual participation level once the interaction has occurred.	
Questions: Any changes?	

List:	InteractionReasonEnum		Review importance: TBD
Where used:	Currently only used in the Interactions standard		**Full documentation details** (in Interactions Standard Data Dictionary)**:** **Tag description** page 12 **Enumeration list** page 30
Summary: The group developing the Interactions standard identified three reasons an interaction would be proposed or occur: the client (consumer) requested it, the firm recording the interaction created it proactively or initiated it (OnSpec), or the firm recording the interaction created it for a broader audience than just one individual/firm (NonDirected).			**Enumeration values:** ConsumerRequested OnSpec NonDirected
Notes: •			
Questions: • Any changes/additions?			

List:	OrganizationCategoryEnum		Review importance: TBD
Where used:	Currently only used in the Interactions Standard in the following locations: OrganizationCategory ParticipantCategory		**Full documentation details** (in Interactions Standard Data Dictionary)**:** **Tag description** page 14, 15 **Enumeration list** page 32
Summary: An interaction record requires the publisher to indicate who requested or set up the interaction – did it initiate/set up the interaction, did a corporate host, or did the consumer request it?			**Enumeration values:** Consumer Corporate Expert Provider
Notes: • The Interactions Data Dictionary erroneously also lists another list – initiatorEnum – that was subsequently combined with OrganizationCategoryEnum.			
Questions: • Any changes or additions?			

List:	InteractionLevelEnum		Review importance: TBD
Where used:	Currently only used in the Interactions standard		**Full documentation details** (in Interactions Standard Data Dictionary)**:** **Tag description** page 12 **Enumeration list** page 28
Summary: An Interaction record allows the publisher to indicate whether an interaction is one-directional (like a recorded presentation), interactive (like an event with a Q&A component or a meeting), or a deliverable (such as a model, a data set, etc.)			**Enumeration values:** OneDirectional Interactive Deliverable
Notes:			
Questions: • Any changes or additions?			