

Agenda Manager™

Efficiently Create and Distribute Agendas for All of Your Organization's Meetings

- ▶ Automate the Agenda Creation and Distribution Process Across Your Enterprise
- ▶ Track Individual Agenda Items in Real Time
- ▶ Retain the Appearance of Your Current Agenda While Simplifying the Publication Process
- ▶ Implement and Deploy with Minimal IT Support

Automate the Agenda Creation and Distribution Process Across Your Enterprise

Organizations typically hold a number of meetings that involve disparate agenda items and attendees. Successfully managing these items and distributing the final agendas requires a complex process in which preparers manually collect, route and track numerous paper forms and then prepare and print multiple drafts of the agenda. Laserfiche® Agenda Manager™ enables organizations to replace these laborious, paper-based processes with a Web-based system in which preparers can assemble and distribute meeting agendas quickly and easily:

- ▶ With Agenda Manager, users submit an agenda item electronically using a simple, flexible Web form. Users can also attach files, such as staff reports and other supporting documentation, to the item that can then be incorporated into the final agenda packet. Users can select these files from their desktop, a network drive or the Laserfiche repository. They can also utilize Agenda Manager's scanning component to create an electronic version of a paper document on-the-fly.
- ▶ When the submission form is complete, Agenda Manager routes the agenda item and any attached files to the appropriate reviewers, in the order you specify.
- ▶ To foster timely review, Agenda Manager automatically notifies reviewers, via a customizable e-mail message, that items have been

assigned to them. This message also contains a link that reviewers can click to quickly view the item.

- ▶ As part of the review process, reviewers are able to make minor modifications to the item in order to add information or make corrections; they can then either approve or reject the item. If an item is rejected, Agenda Manager automatically notifies the user who submitted the item and provides the reason for rejection. The user then has the option to revise and resubmit the item.
- ▶ Once an item has been approved, the preparer can easily add the item's information to the agenda, without having to copy or paste text. The preparer can also quickly add, remove or rearrange items in order to accommodate last-minute changes. With the click of a button, the preparer can then publish the final version of the agenda, along with the supporting documentation, in several formats, which ensures easy distribution.

Track Individual Agenda Items in Real Time

Most paper-based methods of agenda management lack an easy-to-use, automated mechanism to enable the preparer and others to track the actions that have been taken on an agenda item. Agenda Manager maintains a detailed history for each item that lists each of the actions that has occurred, including changes made to the item by reviewers. Because users who submit items can also access this information, they no longer need to ask the preparer for updates regarding their item's status.

Retain the Appearance of Your Current Agenda While Simplifying the Publication Process

Agenda Manager utilizes a Microsoft® Word™ plug-in, which enables the preparer to produce a final agenda whose style and structure are familiar to each meeting's attendees. The preparer can then easily publish the agenda, along with the supplemental documentation, as a bookmarked, searchable PDF file that can be printed, distributed electronically or posted online.

If items are accompanied by reports or other files, the agenda will contain links that users can click to quickly open this supporting documentation, provided that Adobe® Acrobat® Standard or Professional is installed on the workstation used for publication. Furthermore, if you post the agenda packet online, Agenda Manager will automatically break the packet into individual files so that users can access the agenda without having to download the entire packet. Users can then open the accompanying documents individually by clicking the appropriate links.

Agenda Manager also publishes the agenda packet as a ZIP file so that users can download both the agenda and the accompanying documentation and browse through the files individually. Users can also easily distribute the ZIP file via e-mail.

Implement and Deploy with Minimal IT Support

Laserfiche recognizes that ease-of-installation and ease-of-deployment are key factors to the successful implementation of new software. To that end, we've designed Agenda Manager to integrate seamlessly with Microsoft® Internet Explorer™, v. 5.0 and later. For most users, Agenda Manager thus requires no software installation on individual workstations and requires minimal support from your organization's IT department. Furthermore, Agenda Manager's intuitive, Web-based design eliminates the need for extensive training while fostering a smarter, more efficient agenda management process.

Agenda Manager Highlights

- ▶ Eliminate an inefficient, paper-based agenda preparation process by creating, managing and distributing agendas for multiple meetings electronically.
- ▶ Provide users with an automated, enterprise-wide agenda management tool that delivers numerous benefits without requiring them to change the way they work.
- ▶ Reduce lag time by automatically routing proposed agenda items to the appropriate reviewers, in the appropriate order.
- ▶ Ensure timely review of proposed items by automatically notifying reviewers that items require their attention.
- ▶ Maintain a detailed electronic log of all the actions that have been taken on each item.
- ▶ Publish your final agendas and supporting documentation as easily-distributed PDF and ZIP files, at the touch of a button.
- ▶ Use Agenda Manager to automatically schedule each of your meetings, according to a specified recurrence pattern.
- ▶ Minimize the burden on your IT department by utilizing an intuitive, Web-based tool that can be quickly installed and easily maintained.

The Next Step

Please call (800) 985-8533 or e-mail info@laserfiche.com