



## HP TRIM Meeting Manager module

Data sheet

The HP TRIM Meeting Manager module makes tracking information for formal meetings easier. Before a meeting, you can submit agenda items, and HP TRIM Meeting Manager compiles them and gets approval in advance. During and after the meeting, it provides minute taking, including tracking of outcomes and actions. With HP TRIM Meeting Manager, you can turn your conference room ideas into real organizational action.

### Transform meetings into organizational action

Meetings serve a critical purpose in every organization. Effective meetings can save valuable time and can help transform discussions into quantifiable outcomes. Successful meetings add real value to your organization—generating ideas and actions, then progressing actions across the business and providing sound communication to key stakeholders.

With the HP TRIM Meeting Manager module, you can bring structure to the information required to make meetings more efficient and effective. Built on HP TRIM software, HP TRIM Meeting Manager can be the cornerstone of your meeting success, allowing you to control and automate the meeting documentation process according to your business requirements. From pre-meeting preparation to onsite meeting execution through post-meeting follow-up and beyond, HP TRIM Meeting Manager organizes your meeting information for you, so you can focus on results.

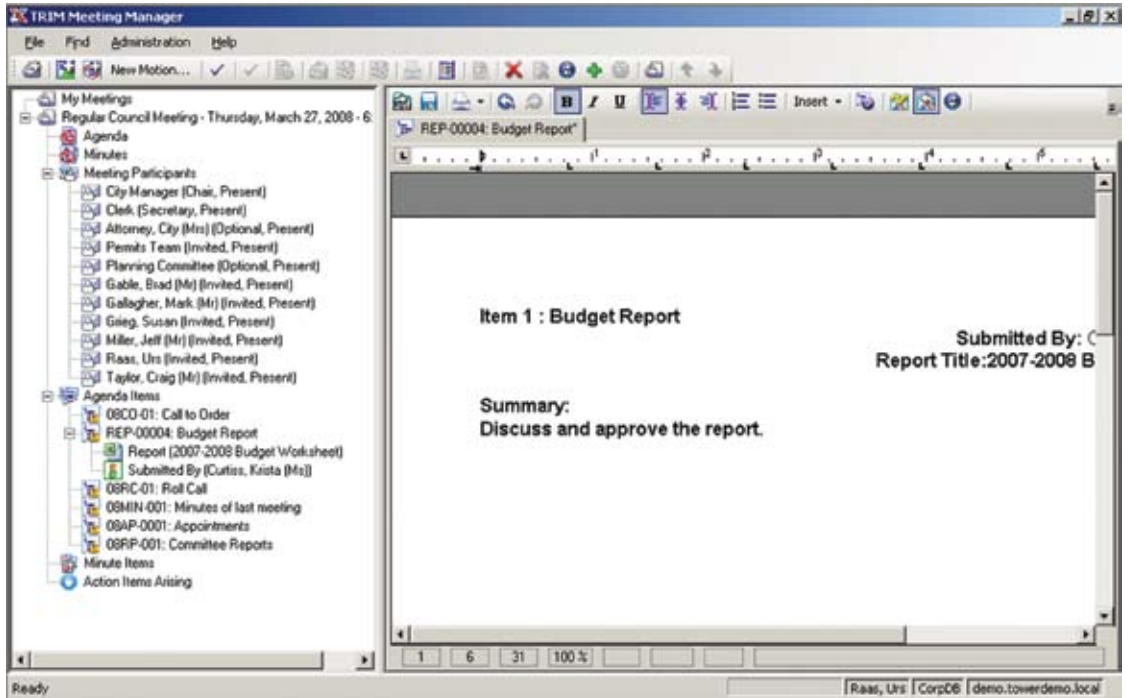


### Organize your meeting information

Collecting, consolidating, and approving information and documentation submitted for a meeting agenda can be an onerous task, often performed by personnel with privileges. HP TRIM Meeting Manager manages the entire information flow for meeting processes, adding value before, during, and after a meeting.

### Compile agenda items quickly and easily.

HP TRIM Meeting Manager automatically creates an agenda from standing items and submitted agenda items, and then secures approval for the agenda.



## Prepare for your meeting effortlessly

HP TRIM Meeting Manager automates the process of setting up meetings. Whether your meeting is weekly, monthly, or ad hoc, HP TRIM Meeting Manager schedules it based on pre-defined scheduling templates.

Once you set up your meeting, you can automatically create the agenda from standing items and submitted agenda items, and then secure approval for the agenda. Once approved, the agenda becomes a searchable object within HP TRIM. Users can simply highlight the meeting and access all associated documents, including the agenda. Meeting attendees with appropriate permissions can also add associated documents that become easily searchable within the context of the meeting.

## Manage your meeting efficiently

Once the meeting has begun, HP TRIM Meeting Manager continues to provide automated management capabilities, including:

- **Attendance:** Track meeting attendees and log attendance within HP TRIM as a business record.
- **Voting:** Record the outcome of a vote, such as whether a vote was carried or rejected. Votes can be recorded as anonymous or by the name of the voter, based on the voter's preference.
- **Minutes:** Allow the minute-taker to create minutes based on agenda items and compose the minutes during the meeting. The minutes can be kept public or private during the meeting, based on user preference. When the meeting is about to end, the minute-taker can present the minutes and have attendees approve them as part of the meeting process, increasing meeting accuracy and productivity.
- **Follow-up:** Automatically assign follow-up tasks to the appropriate user, based on the real-time approval of the minutes.

## Track meeting outcomes

After you adjourn the meeting and file the agenda, you can initiate post-meeting tracking capabilities. Follow-up tasks are assigned to users and tracked through automatically generated e-mails.

Through tight integration with HP TRIM, HP TRIM Meeting Manager lets you easily publish meeting agendas and minutes to your Web site. This enables local governments and councils, for example, to meet their obligation of making formal agendas and meetings available to citizens.

## Part of a complete record and document management solution

HP TRIM is built on more than 20 years of record and document management experience. HP TRIM Meeting Manager builds on this solid foundation to seamlessly integrate meeting management capabilities with your business operations.

With this level of integration, you can increase your organizational effectiveness. For example, information from previous meetings, stored within HP TRIM Context, can serve as a source for ideas or decisions for future meetings. Based on security rights, key stakeholders can also easily find and view the meeting agenda, associated documents, minutes, and actions.

HP TRIM Meeting Manager preserves your meeting information as formal business records. At the same time and according to security rights, key stakeholders across your organization and outside your organization can access this information as required.

## Key features and benefits

### **Increase meeting success**

- Prepare the agenda through the automatic compilation of submitted agenda items
- Record minutes during the meeting
- Record decisions, voting, and follow-up tasks during the meeting
- Enable minute acceptance during the meeting
- Integrate follow-up tasks into the business process workflow

### **Increase efficiency and productivity**

- Locate meeting documentation, from agendas through minutes to follow-up actions, in context with the meeting
- Apply ideas and decisions from one meeting to subsequent meetings

### **Provide meeting integrity**

- Apply HP TRIM access control to meeting agenda, minutes, and all related documents
- Manage attendee-meeting relationships

### **Increase meeting transparency**

- Easily share meeting documents among attendees
- Provide more secure access to stakeholders across your organization and externally as required

# A complete solution

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4AA2-0665ENW Rev. 1, June 2009

