\*Four main processes for project (Analytics dashboard, pre-meeting process, in-meeting process, and post-meeting actions).\*

\*Pre-meeting process:\*

Scheduling process:

This is managed by their calenders on outlook, requires nothing from our end,

Supporting requirements (B,c,d - part of the scheduling process):

b. A calendar for the participant on the platform.

c. See availability for slot booking.

d. Schedule meetings (one-time and recurring) and choose priority.

This should be done on our dashboard. We directly all outlook api’s to get meeting details, participants can upload any documents here which than can be viewed during the meeting.

\*Pre-meeting actions:\*

- Uploading pre-requisite documents

- Any work to be completed before the meeting

- Create agenda for the meeting

- Meeting checklist

\*In-Meeting process (Contains below 3 sub-processes):\*

Call WebEx API for this.

Meeting attendance process:

- Record who attended the meeting

Meeting action process:

- Recording any assigned actions to attendees

- Also, update actions

Meeting decision process:

- Recording the business decisions

\*Post-meeting actions:\*

Publishing results of the meeting

(Have to add more features to this part)

Meeting notes process:

- Additional features: Dictation feature for summary of the meeting.

\*Additional Features:\*

-Integration with smartsheets (Necessary to do and won’t take much time)

the app will work something like this :

1. Everyday using a cronjob, once at the start of the dat and once at the end of the day, it will call for their meetings list in their outlook using outlook api’s and store those meeting details which will be stored in our database

2. ⁠ the software which is used like webex, zoom, teams, their api’s will be called at the end of the day to look at the meeting times, participants and participant time at the end of each day and that will be stored in our database and that is what we will use to display in our dashboard.

3. ⁠dashboard will have nominal features such as login/logout, etc etc and place where all meeting data is showed.

**1. Analytics Dashboard:**

* Purpose: To provide a centralized platform for visualizing and analyzing meeting data, including time spent, project categorization, and key metrics.
* Features:
  + Interactive and user-friendly interface for easy navigation and data interpretation
  + Real-time data updates to reflect the latest meeting information
  + Customizable dashboards to cater to different user roles and preferences
  + Integration with the pre-meeting, in-meeting, and post-meeting processes to provide a holistic view of meeting effectiveness
  + Receive reminders for the scheduled meetings
  + The meeting organizer can set if the meeting should be one-time or recurring.
  + Option to reschedule a meeting
* Benefits:
  + Enables data-driven decision making by providing actionable insights
  + Helps identify areas for improvement in meeting management and resource allocation
  + Facilitates better communication and collaboration among team members

**2. Pre-Meeting Process:**

* Purpose: To streamline and optimize the activities that occur before a meeting, ensuring better preparation and productivity.
* Features:
  + Integration with Trace3's existing platform for seamless meeting scheduling
  + Ability to upload and share pre-requisite documents for better context and informed discussions
  + Agenda creation and distribution to ensure focused and structured meetings
  + Meeting checklist to ensure all necessary preparations are completed
  + Ability to remind the participants/attendees about the meeting
* Benefits:
  + Enhances meeting effectiveness by ensuring all participants are well-prepared
  + Reduces time spent on administrative tasks and allows more time for substantive discussions
  + Promotes accountability and clarity of expectations among meeting attendees

**3. In-Meeting Process:**

* Purpose: To capture and track key information and actions during the meeting itself.
* Features:
  + Attendance tracking to record who participated in the meeting
  + Ability to update and modify action items as needed manually
  + Capturing and documenting business decisions made during the meeting
* Benefits:
  + Ensures clear accountability and ownership of action items
  + Facilitates effective follow-up and progress tracking after the meeting
  + Provides a historical record of key decisions made during the meeting

**4. Post-Meeting Actions:**

* Purpose: To ensure proper follow-up and communication of meeting outcomes and next steps.
* Features:
  + Publishing and distributing meeting results and decisions to all relevant stakeholders
  + Sending automated reminders for assigned action items and due dates
  + Providing a mechanism for tracking the progress and completion of action items
  + Generating meeting minutes or summaries for easy reference and record-keeping
* Benefits:
  + Enhances transparency and accountability by clearly communicating meeting outcomes
  + Helps ensure that decisions and action items are promptly acted upon
  + Provides a historical record for future reference and auditing purposes

**5. Meeting Notes Process:**

* Purpose: To capture and document the key points, discussions, and decisions from the meeting.
* Features:
  + Ability to annotate and highlight important points or decisions
  + Automatic summary generation to provide a concise overview of the meeting
  + Integration with the analytics dashboard for easy access and analysis
* Benefits:
  + Saves time and effort in manual note-taking and documentation
  + Ensures accurate and comprehensive capture of meeting content facilitates easy sharing and distribution of meeting notes to all participants

**6. Integration with Smartsheets:**

* Purpose: To seamlessly connect the meeting management tool with Trace3's existing project management platform.
* Features:
  + Automatic synchronization of meeting data, action items, and decisions with relevant Smartsheet projects
  + Ability to view and update meeting-related information directly from Smartsheets
  + Consistent and centralized data management across both platforms
* Benefits:
  + Eliminates manual data entry and reduces errors and inconsistencies
  + Provides a unified view of project progress and meeting outcomes
  + Enhances collaboration and communication between project teams and meeting participants

**7. Data Privacy and Security:**

* Purpose: To ensure the protection of sensitive meeting information and comply with relevant privacy regulations.
* Features:
  + Secure authentication and access controls to restrict unauthorized access
  + Encryption of stored and transmitted meeting data
  + Regular data backups and disaster recovery mechanisms
  + Compliance with applicable privacy laws and regulations
* Benefits:
  + Safeguards confidential information shared during meetings
  + Builds trust and confidence among meeting participants
  + Mitigates the risk of data breaches and legal liabilities

**Note:**

1. Cronjob is used to send reminders to participants one hour before the meet.

**pre-meeting:  
Organizer:**

1. The organizer can list the meeting he/she scheduled and/or is a participant of.
2. They can add the agenda/check-list/priority of the meeting and/or documents about the meeting.
3. The organizer can approve/delete the request sent by the attendees for the rescheduling

**Admin:**

1. They can see the list of all meetings, project wise.

**Attendees:**

1. They can see the list of meetings they are a part of.
2. They can request reschedule
3. If rescheduled, the request is sent to the organizer

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