



[www.escribecorporate.com](http://www.escribecorporate.com)  
905-305-3424

# eSCRIBE Administrator Training

## TRCA



**Microsoft** Partner

Silver Independent Software Vendor (ISV)

# Training Outline – Day 1

## Training Day 1 – Part 1:

- High-Level eSCRIBE Overview
- eSCRIBE Portal Orientation
- eSCRIBE Administration Review
  - User Management
  - Meeting Management
  - Attendee Management
  - Other Administrative Functions
- Group Activity: Set-up eSCRIBE Meeting Type
- Group Activity: Set-up eSCRIBE Attendee Group

# Training Outline – Day 1 (Cont'd)

## Training Day 1 – Part 2:

- Activity: Meeting site Creation
- eSCRIBE Meeting Site Overview
  - Layout & Orientation
  - High-Level Features
- Activity: Adding Agenda Items
- Agenda Package Preparation
- Activity: Prepare the Agenda
- Activity: Publish the Meeting

# Training Outline – Day 2

## Training Day 2 – Morning:

- Review, Question & Answer
- Pre-Meeting Tasks Deep Dive
  - Resolutions
  - Tasks
  - Pre-populating minutes
- Activity: Pre-Populate Meeting Site
- Advanced Agenda Preparation (Addendums, Merged Packages, Etc)
- Activity: Add Items, prepare Addendum

# Training Outline – Day 2 (Cont'd)

## **Training Day 2 – Afternoon:**

- Conducting Meeting Overview
- Activity: Conduct the Meeting
- Post-Meeting Tasks Overview
  - Minutes Review/Preparation
  - Notifications & Tasks
- Activity: Finalize Meeting Site
  - Review/Prepare Minutes
  - Send Notifications & Tasks
- Review & Practice

# Training Outline – Day 3

## Training Day 3

- Report Manager
- Configuring Report Templates
- Developing Approval and Submission Workflows
- Activating Templates and Workflows
- Review & Practice

# Overview – What is eSCRIBE?

## Administrators



Meeting  
Profiles

Attendee  
Profiles

## Participants



## Contributors



## Public



eSCRIBE Boardroom

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### eSCRIBE Meeting Calendar

March, 2012

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27	28 11:00 am - 12:00 pm Information Systems Steering Committee	29	1 9:00 am Senior Management Meeting_Mar1 9:00 am Regular Council Meeting_Mar1_201 3:00 pm Ad Hoc Meeting_Mar1_2012 + 1 more item	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23 5:00 pm - 6:00 pm SBS Switzerland_Mar23_2012	24
25	26	27	28 10:00 am - 11:00 am SBS Switzerland_Mar28_2012	29	30 10:00 am Information Systems Steering Co 9:00 pm Regular Board Meeting_Mar30_201	31

#### My Announcements

Announcements

Announcement	Modified
Media training will be held on Thursday March 12, 2012, please contact admin@scribecorporate.com to register	2/27/2012 2:25:48 PM
Budget submissions are due by March 15, 2012 for all departments	2/27/2012 2:41:07 PM

#### My Agenda Requests

Pending

Edt	Title	Meeting Type	Category	Recommendation
	Consultants Report	Regular Board Meeting		Rec. 1: That the board approve funding of \$25,000 to implement key recommendations of study
	Report to the Board	Regular Board Meeting		Rec. 1: That the report be received for information purposes

#### My Tasks

Add a Task

Meeting Site

Show Closed Session Tasks | Export Report | Print Friendly View

Agenda Item	Assigned To	Due Date	Description
<b>Senior Management Meeting_Apr1_2012</b>			
Late Additions to Agenda	Unassigned	3/4/2012	





Thank you!



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