

eScribe

Revitalize Your Local Public Meetings

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escribemeetings.com

Meet Your Speakers



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Today's Agenda

- Who we are
- Looking forward to eScribe 6
 - Why eScribe 6?
 - Where are we at with eScribe 6
 - Future product roadmap
 - Customer webinar series
 - Upgrading to eScribe 6
- Customers Testimonials about eScribe 6
- Product Demo of eScribe 6
- Q&A



eScribe Company Overview





About eScribe:

- Founded in 2007 in Markham, Ontario, Canada
- Acquired by Passageways, our parent company, in 2021 to grow and expand eScribe
- Provides solutions to municipalities, school boards and more across the world
- 100% focused on meeting management software with compliance for the public sector
- eScribe offers a seamless, stress-free experience with our tools and workflows

About OnBoard and Passageways:

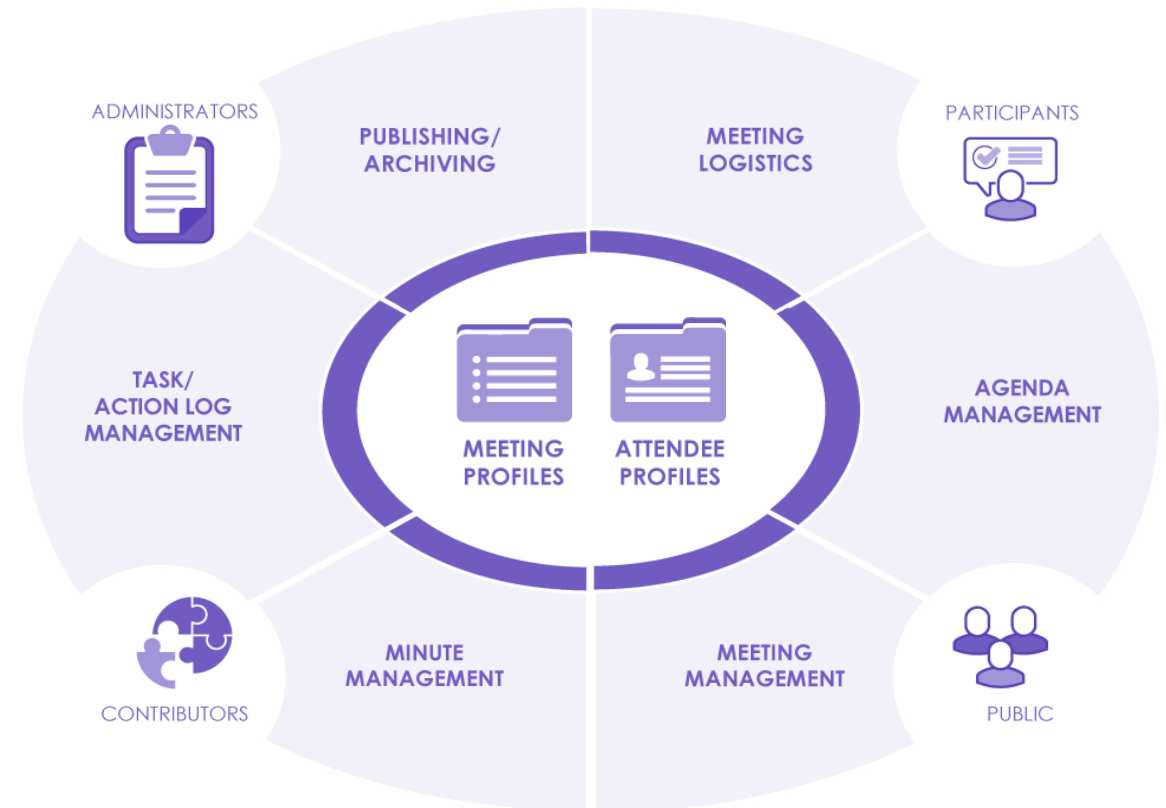
- Passageways, the parent company of eScribe and OnBoard, was founded in 2003
- OnBoard aims to help boards function at a higher level empowering organizations to make a bigger difference in the world
- Today, OnBoard serves more than 5,000 organizations and their 30,000 boards and committees in 60+ countries worldwide



eScribe Differentiators

Helps streamline meeting management processes and workflows for **before, during, and after** meetings (end-to-end)

- eScribe is Meeting Management focused
- A Single Platform Solution
- Top Tier Customer Experience and Support
- Scalable: Designed with your growth in mind
- Functionality dedicated to keeping up with the needs of the public sector
 - Accessibility
 - Security
 - Transparency



Looking Forward to eScribe 6



Why eScribe 6?

We heard **your** feedback

- You want fewer bugs
- You want more frequent feature improvements & releases
- You want improved speed, performance & usability

- **Do your job even faster:**
 - Faster performance
 - More efficient workflows
 - Fewer clicks needed
- **Improved layout and flow**
 - More user-friendly
 - More intuitive design
 - Improved layout and navigation
- **Modernized:**
 - Updated appearance
 - More reliable
 - More frequent feature updates in the future



Where Are We Today With eScribe 6?



Top Level Need to Know

- We have a handful of customers operating on eScribe 6
- We are currently implementing eScribe 6 with new customers
- We're on target to begin upgrades in 2025
 - Customer upgrades from eScribe 5 to eScribe 6 will be done in small batches to ensure success
- Like any product release, we expect to find small bugs. We appreciate your feedback on issues that arise!
- Secondary and tertiary features will be released on a rolling basis throughout 2025 and into 2026
- eScribe 6 will continue to evolve as the team builds out future product innovations



eScribe Webinar Series for Current Customers



About the Series

- Began the monthly series in March 2024
- Our mantra is to **be transparent** and **do no harm**
- So far, we covered a variety of topics related to eScribe 6 and live demos:
 - IT/Technical aspects
 - Tasks and Reporting
 - Admin and Participants Roles
 - Meeting Templates
 - Documents and Approvals (Part I and Part II)
- In each session, our Product team gives an update on the 'State of the Product' and the 'State of Upgrades'
- All webinar recordings and other resources are available in the Community Portal



Update on Upgrading to eScribe 6



Timing of Upgrades

For customers currently on eScribe 5 ...

- Earlier this year, initial testing uncovered issues we want to resolve before upgrading more customers
- Customer upgrades will not begin until 2025
- Ensures a stable, seamless upgrade experience for all customers
- Your organization will not be upgraded to eScribe 6 without proper notice
 - Please talk with your CSM if you have timing preferences
- Timing will be based on:
 - Use of key features
 - Key events to avoid
 - Readiness to adopt change



Things to Note for Upgrade Process

- Notification for upgrade with pre-upgrade survey
- eScribe will contact you to review the upgrade process, configurations, and timing
- Receive access to a training site and multiple training resources available
- eScribe Academy (LMS) has updated training videos
- Community Portal has updated Help Articles
- CSM team hosting Open Office Hours available for anyone to join
- CSMs available for support throughout the entire process
- Post-upgrade survey



eScribe 6 Product Roadmap



eScribe 6 Roadmap

NOW

Graphical Vote Results

Updated vote results page including new layouts and voter cards

Subscription Lists

Allow users to subscribe to meeting series and receive notifications

Automatic Resolution Numbering

One-click assignment of motion numbers during meetings

NEXT

Flexible Approval Workflows

Allow for concurrent approvers when creating a workflow for documents

Public Comments

Allow public users to post comments related to agenda topics

LATER

Meeting Series Recurrence

Create a recurring meeting series automatically within eScribe

Meeting Manager Improvements

Improve the existing meeting manager module to improve adoption and usability

Document Manager Improvements

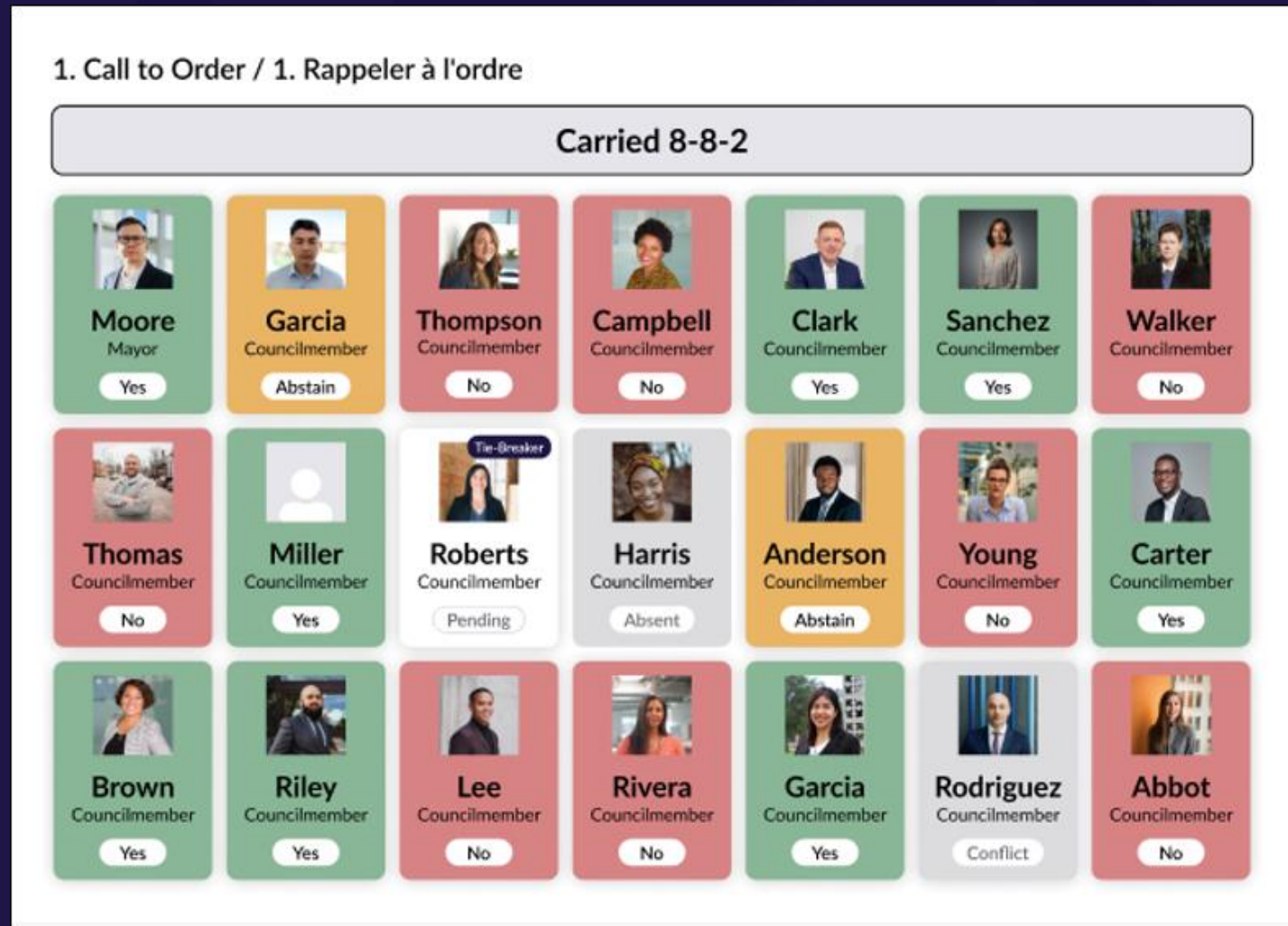
Improve the existing document manager module to improve adoption and usability



Note: Roadmap items and timing subject to change

Graphical Vote Results

Improved voter displays on the public view including new layouts and photo options



Subscription Lists

Allow users to subscribe to public meetings and allow meeting admins to manage the subscription lists

The screenshot displays the 'Subscription Lists' modal in the eScribe 6 application. The modal is titled 'Subscription Lists' and includes a close button (X) in the top right corner. Below the title, it says 'Manage your subscriptions using the checkboxes below' and 'Account: username@escribemeetings.com'. The modal contains a list of subscription options, each with a checkbox. The following table represents the data shown in the modal:

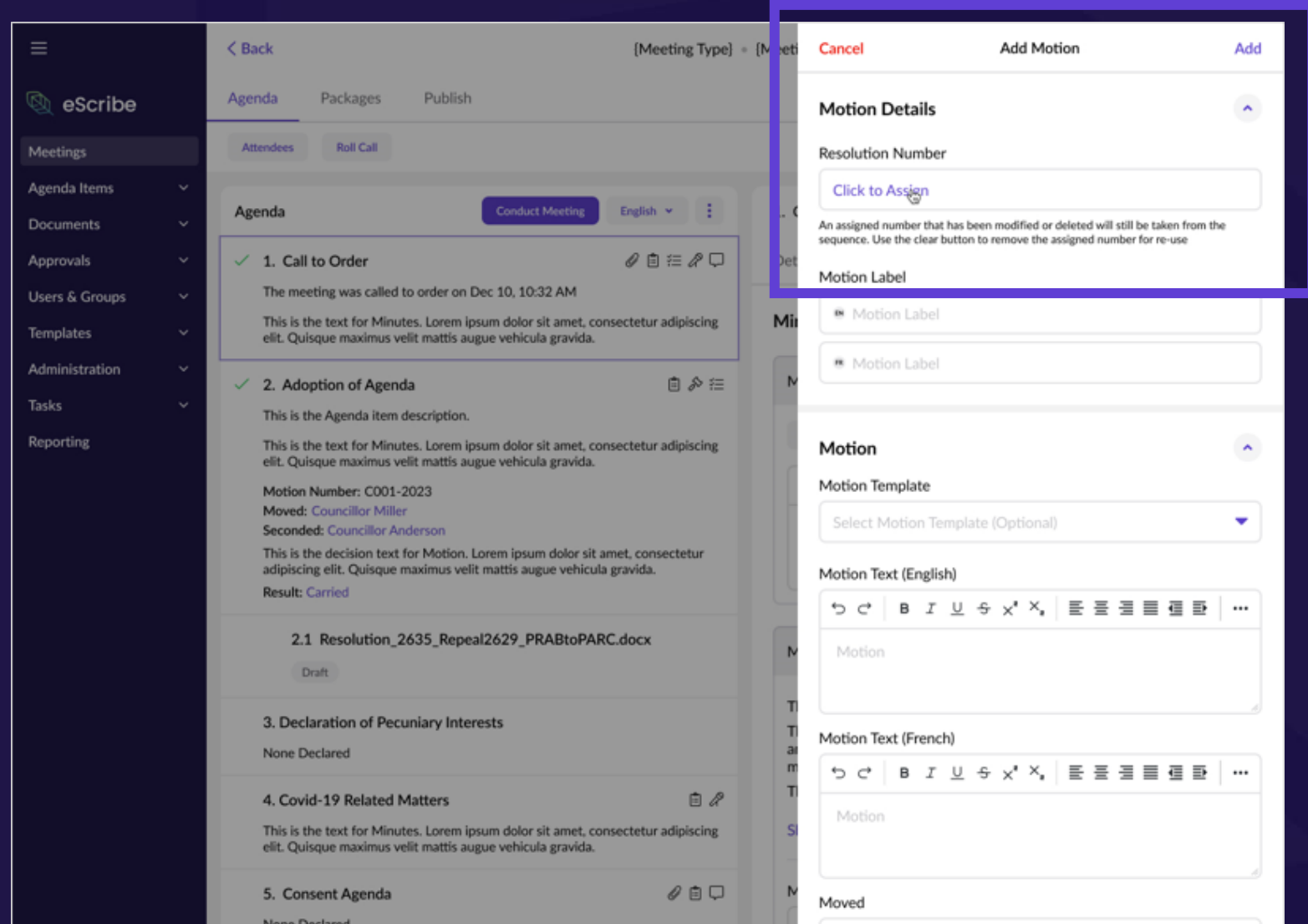
Subscription Option	Selected
Appointments Committee	<input type="checkbox"/>
Accessibility Advisory Committee	<input type="checkbox"/>
Advisory Committee Meetings	<input type="checkbox"/>
Airport Board	<input type="checkbox"/>
Board of Public Works	<input checked="" type="checkbox"/>
Committee of Adjustment	<input type="checkbox"/>
Committee of the Whole	<input type="checkbox"/>
City Council Meeting	<input checked="" type="checkbox"/>
Environmental and Sustainability Advisory	<input checked="" type="checkbox"/>
Finance Meeting	<input type="checkbox"/>
Heritage Advisory Committee	<input type="checkbox"/>
Municipal Election Compliance	<input type="checkbox"/>
Planning and Development Committee	<input checked="" type="checkbox"/>
Property Standards Committee	<input type="checkbox"/>

At the bottom of the modal, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a mouse cursor. In the background, the application interface shows a search bar, a list of 'Upcoming Meetings' (including 'Accessibility Committee' and 'Council Meeting'), and a list of 'Past Meetings' (including 'Council Meeting (4)', 'Council Meeting', and 'Council Meeting').



Automatic Resolution Numbering

Create resolution numbers for a meeting template and one-click auto assign when creating a motion



The screenshot displays the eScribe 6 interface. On the left is a sidebar with navigation options: Meetings, Agenda Items, Documents, Approvals, Users & Groups, Templates, Administration, Tasks, and Reporting. The main area shows the 'Agenda' section with a list of items. A red box highlights the 'Add Motion' dialog box, which is open over the agenda. The dialog box has a title bar with 'Cancel', 'Add Motion', and 'Add' buttons. It contains the following sections:

- Motion Details**: Includes a 'Resolution Number' field with a 'Click to Assign' button and a note: 'An assigned number that has been modified or deleted will still be taken from the sequence. Use the clear button to remove the assigned number for re-use'. Below this is a 'Motion Label' field.
- Motion**: Includes a 'Motion Template' dropdown menu with the text 'Select Motion Template (Optional)'. Below this is a 'Motion Text (English)' field with a rich text editor toolbar. Below that is a 'Motion Text (French)' field with a similar toolbar.
- Moved**: A field for the 'Moved' attribute.

The background agenda list includes items like '1. Call to Order', '2. Adoption of Agenda', '2.1 Resolution_2635_Repeal2629_PRABtoPARC.docx', '3. Declaration of Pecuniary Interests', '4. Covid-19 Related Matters', and '5. Consent Agenda'.



Demo



Contact

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Thank you.

