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## Meeting Agenda Templates for Automatically Inserting Agendas in Documents

Hakan Uysal

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## **Meeting Agenda Templates for Automatically Inserting Agendas in Documents**

### **ABSTRACT**

This disclosure describes techniques to provide a meeting agenda template that can be used to create meeting agendas. A user can create a customizable meeting agenda template that includes particular fields for meeting attributes and items typically discussed in meetings. For a particular meeting, the user can input a simple command in a document to cause a meeting agenda derived from the template to be added to the document. Information such as attributes and meeting notes related to the meeting can be input by the user to the agenda fields. Described techniques can reduce the time spent in preparing a meeting agenda.

### **KEYWORDS**

- Meeting agenda
- Meeting notes
- Meeting automation
- Document template
- Document building block
- Text template
- Customizable template
- Template insertion

### **BACKGROUND**

A meeting agenda is often used to structure the particular items to be discussed in a meeting and to organize notes taken during the meeting. For example, weekly business meetings may have agendas with standard items that are discussed each week. In meetings conducted via

videoconferencing, the meeting agenda can be displayed by one or more participating devices for all participants to view.

When meetings are conducted with an agenda, there may be several actions to take by a user who is handling the meeting agenda and taking notes of the meeting. For example, the user starts the meeting by selecting a link, takes notes for each item or bullet point of the agenda that is discussed in the meeting, clicks on links listed in the agenda to check information needed for the meeting, etc.

When creating an agenda for a specific meeting, some users manually copy an agenda template to a particular place in a document that can be filled in with information related to that meeting. For example, a handcrafted agenda template (e.g., in text format) can be provided at the top of an agenda document, and before a meeting starts, a user running the meeting can copy the template to another portion of the document (or to a different document) and input specific information related to the meeting to create the agenda. This manual process can take up time during the meeting, especially if the user handling the entering of information in the agenda is changed at every meeting and some users are unfamiliar with the procedure of creating the meeting agenda.

## DESCRIPTION

This disclosure describes techniques for creating a meeting agenda within a document from an agenda template by using a simple text command. Instead of having to manually copy and paste an agenda from a document to the desired document or location, the user can input a particular text command (such as a single special character) to cause a menu of options to be displayed, including an agenda template option. Selection of the agenda template option causes an agenda that is a copy of the template to be displayed. One or more fields of the agenda such as

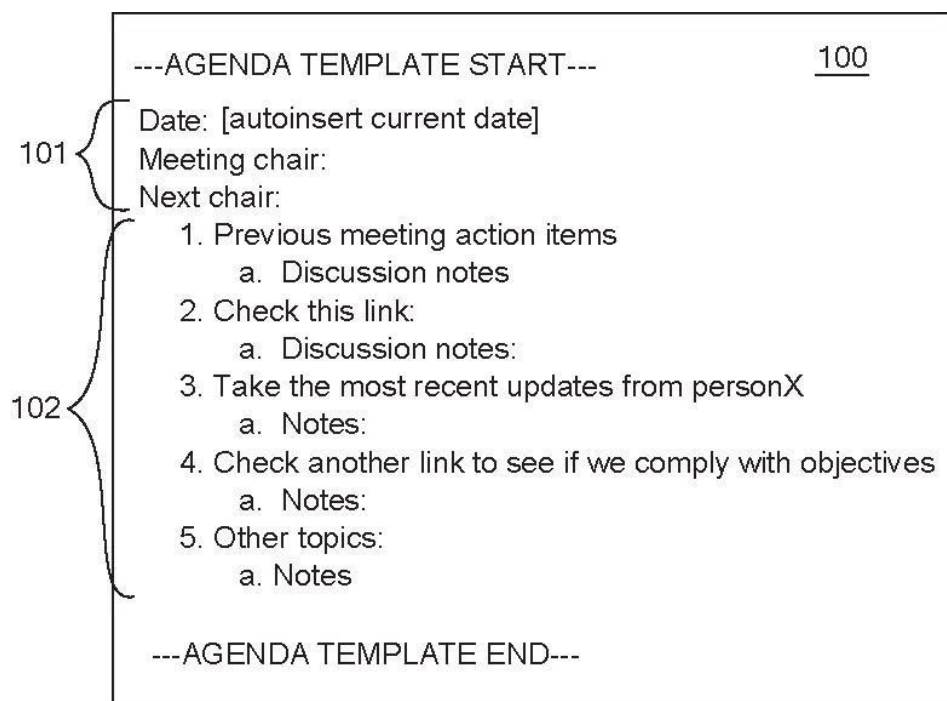
the current date can be automatically filled in by the system presenting the agenda document.

These features allow users to quickly insert an agenda based on a template in a desired location in a document, thus reducing the time spent preparing for a meeting and allowing more time of the meeting to be spent discussing agenda items.

The described techniques can be implemented on any suitable device, e.g., desktop or laptop computer, portable user device (e.g., a smartphone), server device, etc. The user is provided with options to enable or disable described techniques and can permit specific types of data to be utilized and can deny use of other types of data.

#### Receiving user input to define agenda templates

According to described features, a system can receive user input to define agenda templates for meeting agendas. In some examples, the user can create a text portion or text file that includes text defining the template. An example of an agenda template is shown in Fig. 1.



**Fig. 1: Example meeting agenda template**

As shown in Fig. 1, an agenda template (100) can include attribute information fields (101) and agenda item fields (102). The attribute information fields can be associated with information describing one or more attributes of a meeting, such as the date of the meeting, the current meeting chairperson (e.g., person handling the meeting agenda and meeting notes), the next meeting chairperson, etc. The agenda item fields can be associated with information (e.g., topics or subjects) which are to be discussed in the meeting. For example, agenda items can include action items, previous action items carried over from the last meeting, links to other information to discuss in the meeting, etc.

The attribute information fields and agenda item fields in the agenda template can be left blank, to be filled in by a user creating an agenda from the template for a particular meeting. For example, the meeting chairperson and next chairperson attributes may vary and so are left to be filled in at the time of the meeting. Some attribute information fields and/or item fields in the agenda template can be pre-filled in with information if such information remains the same for most or all meetings. For example, if one person is usually the meeting chair, that person's name can be specified in the template; if the meeting chair is different for a particular meeting, that name can be changed at the time of the meeting.

Some attribute information fields and/or agenda item fields in the agenda template can be instructed by the user to be automatically determined and filled by the displaying application or device in any agenda that is created from the agenda template. For example, in the template of Fig. 1, the date attribute has been specified by the user with a command to be automatically filled with the current date. This command causes the current date to be inserted into the date field of an agenda created from this template for a particular meeting. Other attributes or items of the agenda template can be similarly specified to be filled with information known by the system or

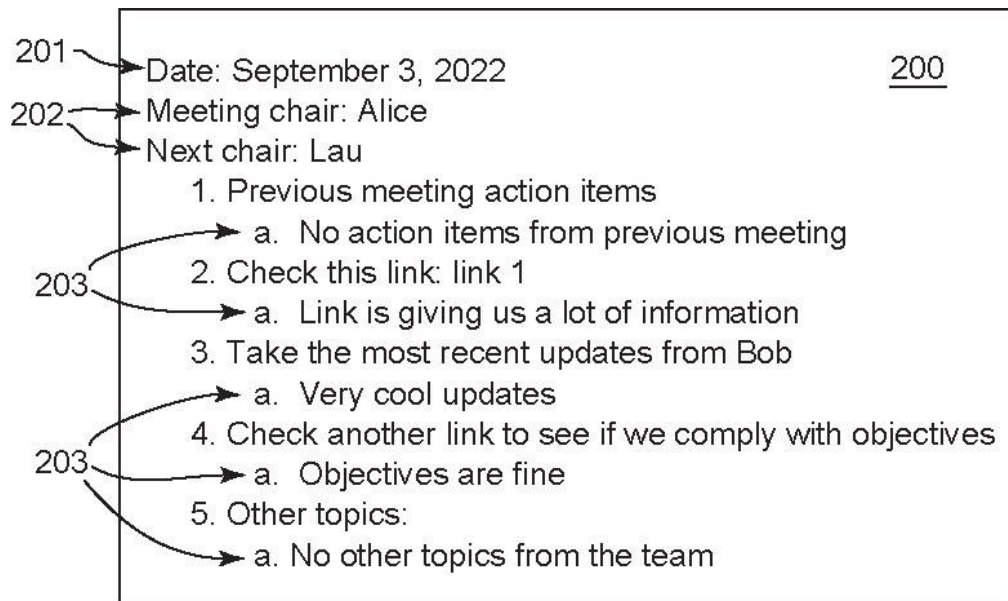
linked to by a link specified in the agenda template. The agenda template can be assigned a name or other identifier so that the template can later be identified for creation of an agenda.

### Creating an agenda using an agenda template

A user can create an instance of an agenda based on the agenda template described above by inputting a command into a user interface of an application program. For example, the command can include a particular text character or word that is input to and displayed in a document that is being displayed by the system, which is recognized as a command to create an agenda. In some cases, the command is followed by an identifier of an agenda template. For example, if the command is “~” and the template identifier is “template1,” then text specifying “~ template1” causes an agenda to be created from the identified template.

In some cases, the input command causes a menu of options to be displayed. The options can include agenda templates that are available to be selected, e.g., each template labeled with a different identifier. In some cases, other options can also be presented in the menu, e.g., a current date (which causes the current date to be inserted), various templates for tables that can be inserted in the document, etc.

The user can select an agenda template as described above to cause an agenda derived from the selected template to be inserted in and displayed in the document. If the input command includes text in the document, the agenda is displayed in place of the input command in the document. The user can then input information into the displayed agenda that is specific to the particular meeting for which the agenda was created.



**Fig. 2: Example agenda inserted in document from template**

Fig. 2 shows an example document that includes an agenda (200) that has been inserted in a document using a command as described above, where the agenda is derived from the agenda template shown in Fig. 1. As shown, the date (201) has been automatically determined and inserted into the template by the system displaying the document. The other attribute information (202) and agenda item notes (203) have been input by a user in the document before, during, and/or after the meeting. Thus, an agenda with all the desired attribute fields and agenda item fields can be created quickly and easily for each meeting, without having to manually copy text of an agenda template.

An agenda template can also be used in a calendar application. For example, a link to the agenda template can be displayed within a calendar entry, such that if the link is selected by a user, an agenda derived from the template is displayed in the calendar entry or is displayed in a document that is opened in response to the selection of the link.

The described techniques can be implemented in any suitable software application such as a document editor/ word processor, calendar, meeting software, note taking software, etc.

Users are provided with options to grant permissions to and/or to disable described features entirely. The various features of the system are implemented with specific user permission to access user information that serves as input to the system (e.g., user context information, user messages, camera and microphone input, a user's location, a user's preferences, etc.). Users may be provided with controls allowing the user to make an election as to both if and when systems, programs or features described herein may enable collection of user information, and if the user is sent content or communications from a server. Certain techniques are not implemented if users deny permission. In addition, certain data may be treated in one or more ways before it is stored or used, so that personally identifiable information is removed. For example, a user's identity may be treated so that no personally identifiable information can be determined for the user. Thus, the user may have control over what information is collected about the user, how that information is used, and what information is provided to the user.

## CONCLUSION

This disclosure describes techniques to provide a meeting agenda template that can be used to create meeting agendas. A user can create a customizable meeting agenda template that includes particular fields for meeting attributes and items typically discussed in meetings. For a particular meeting, the user can input a simple command in a document to cause a meeting agenda derived from the template to be added to the document. Information such as attributes and meeting notes related to the meeting can be input by the user to the agenda fields. Described techniques can reduce the time spent in preparing a meeting agenda.



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