

Research Note Authoring and Meeting Packet Automation

Why the InfoTech Research Note Authoring & Meeting Packet Automation Modules

Research Notes and Meeting Packets are the most time-sensitive of research publications produced by financial institutions. Research departments need a quick and easy way to create and distribute these reports. The *Research Note Authoring* module allows research analysts and associates to leverage corporate databases to easily author and submit notes for publication and distribution. The *Meeting Packet Automation* module uses reports created by the Research Note Authoring module to automate the creation of a comprehensive packet that may include a table of contents, summary sheets, complete notes and other defined reports.

The Research Note Authoring and Meeting Packet Automation Modules Features

- East-to-use graphical interface to view and edit market data, analytical data, yearly and quarterly figures for actual or estimated earnings and revenue data
- Easy-to-use wizards to automatically bring data, text and graphics into templates that comply with the research department's desired format and corporate branding
- Simple functions to assign additional tagging information and set up distribution preferences for the created reports
- Simple macro functions to refresh all or part of the data in the document
- Intuitive administrative interfaces to select existing Research Notes for inclusion in Meeting Packets
- Tools to extract and re-use information from existing reports to create different Meeting Packet versions

Benefits of the Research Note Authoring and Meeting Packet Automation Modules

- Easy-to-manage and easy-to-deploy solution built using the latest technology
- Efficient access to data available in different formats and coming from various sources
- Quick and easy report creation, editing, and tagging
- Automatic insertion of company disclosures and other statements required by compliance
- Complete preservation of corporate branding

